



PowerTalk
User's Guide

PowerTalk



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User's Guide

Apple
PowerTalk

 Apple Computer, Inc.

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Preface

What you need to know before installation

Macintosh basics

Before you install PowerTalk software in your system, you should be familiar with the basics of using Macintosh system software version 7, or later: how to work with disks, programs, folders, and files and how to use menus and dialog boxes. If you will be using your PowerTalk software on a network, and you've not worked on a network before, you may wish to read the general networking information in the learning materials that came with your computer or your software upgrade kit.

“PowerShare” account information

You can use PowerTalk with or without PowerShare servers. When you set up your PowerTalk software after installation, the system asks you if you have a PowerShare account. For you to have a PowerShare account, your Macintosh must be connected to a network with access to PowerShare servers, one or more computers that are set up to provide a variety of collaboration services. If you have a PowerShare account, you will need to have your account information before you start to use the PowerTalk software. Ask your network administrator or support coordinator for that information.

System requirements

All Macintosh and PowerBook computer models work with PowerTalk system software except Macintosh Plus, Macintosh 128K, Macintosh 512K, and Macintosh XL. PowerTalk requires a hard disk and 4MB of internal random-access memory (RAM); 5MB of RAM are recommended.



Introduction to PowerTalk System Software

PowerTalk system software helps people work together—to collaborate—more effectively. Moreover, PowerTalk software provides the foundation for new and innovative products that expand the “collaboration services” available on your Macintosh. These services provide new ways for you to

- correspond with others
- safeguard your communication
- access information on other systems
- automate routine activities

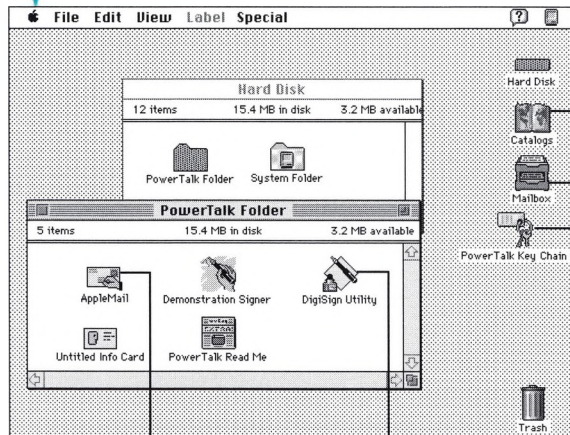
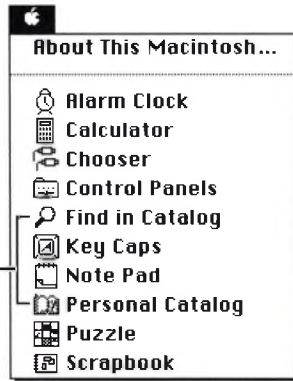
Out of the box, your PowerTalk system software provides many new built-in capabilities:

- a single way to view and use information from a variety of sources about the people with whom you correspond
- a single mailbox on your desktop, with an “In Tray” for viewing and organizing all the various kinds of correspondence sent to you and an “Out Tray” for viewing the correspondence you have sent
- a way to sign and approve your documents electronically
- enhanced privacy and security, including a Key Chain icon that you use to access many services with just one access code (single log-on)
- a built-in service for sending files in the Finder
- support for programs to use the new built-in security, privacy, mail, and catalog services
- support for innovative new collaboration services and products from other software and hardware developers

What's new with PowerTalk system software

After installation, you'll notice some changes to your desktop and the Finder, and you'll have two new programs on your hard disk.

You have convenient access to all kinds of catalog information.



Catalogs provides access to information you need when collaborating with individuals and groups.

The Mailbox contains all your incoming and outgoing mail.

The Key Chain provides access to all your collaboration services through a single access code.

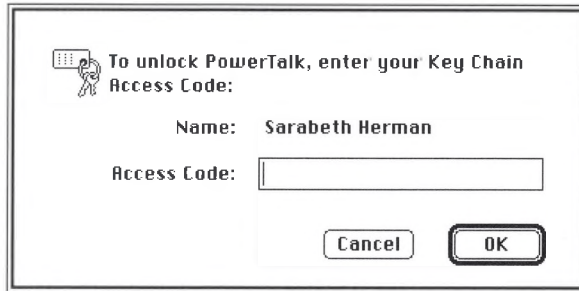
Use AppleMail to create letters, find address information, and send and reply to mail.

Use the DigiSign Utility program to request approval of a Signer file so you can sign your documents electronically.

Built-in collaboration services

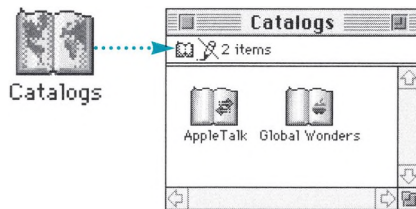
Key Chain

Gain access to all your accounts and services by typing just one access code.



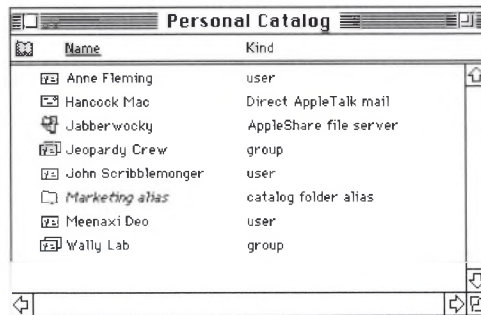
Catalogs

See in one place the catalogs (collections of information about people and things you can work with) to which you have access. Open these to browse information, including addresses of users and groups with whom you want to communicate.



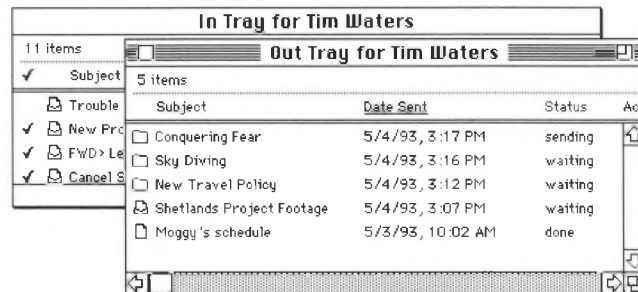
Personal Catalog

Organize personal catalogs of essential collaboration information, such as addresses, that you want kept on your computer.



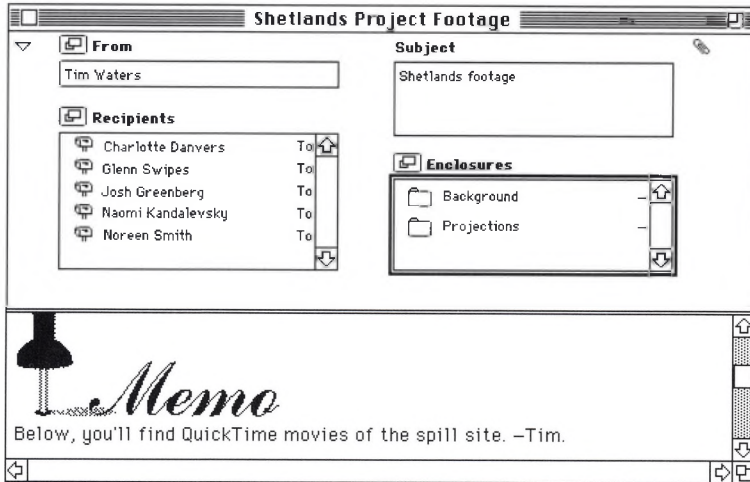
In Tray and Out Tray

Open your mailbox to see all incoming correspondence in one In Tray. Check your Out Tray for the status of documents and other mail you've sent.



Mailer

Any PowerTalk Mailer-capable application can attach a Mailer to send its documents with enclosed files and folders.



Digital Signatures

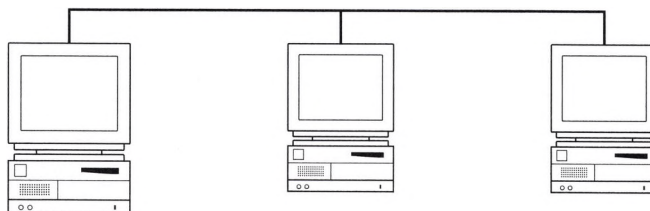
You use a DigiSign Signer to approve, or “sign,” a document on your Macintosh or PowerBook computer. Putting a digital signature on a document assures the integrity of the document. It marks the document in a way that any PowerTalk user—even those without Signers of their own or without access to PowerShare servers—can verify at any time.

Extending your reach with new collaboration services

PowerTalk system software supports any correspondence environment you have and provides a growth path when your organization needs to expand its system.

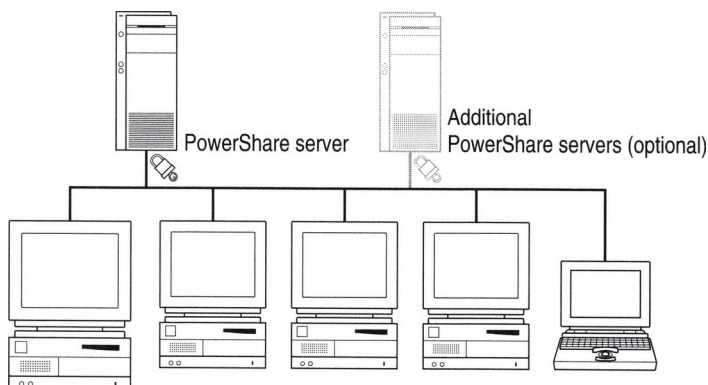
An AppleTalk network without PowerShare collaboration servers

When you use PowerTalk software on an AppleTalk network, you can see available computers and file servers in your Catalogs window. You can send mail directly to any PowerTalk-equipped computer connected to this network, even without PowerShare servers. You can also access file servers without using the Chooser.



A network with PowerShare collaboration servers

You can add PowerShare servers to your network to provide additional catalog and mail delivery services, plus added security and privacy for your correspondence.



Access to more collaboration services

PowerTalk software supports expansion of your collaboration services (for example, adding fax or public mail services). Just add special access software for each new service or account you wish to use.

To get step-by-step instructions for installing and setting up PowerTalk system software, see “Installing System 7 Pro” in *What’s New in System 7 Pro*.

2 Setting Up

Installing PowerTalk system software

It takes only a few minutes to set up your PowerTalk system. You need to

- install the PowerTalk system software with the floppy disks included in your package (see “Installing System 7 Pro” in *What’s New in System 7 Pro*)
- set up your Key Chain and access code
- make sure that your system clock is set correctly for your time zone
- check that your computer is named appropriately for easy identification on an AppleTalk network

New desktop icons

Once your new system is installed and you have restarted your computer, two new icons appear on your desktop. After you have set up your system (discussed in the next section), you'll see a third new icon and will have access to the features that these icons represent.



Mailbox

The Mailbox is the place where all correspondence that is sent to you or accessed by you resides. To look at this correspondence, you open the Mailbox. (After you set up your system, the word *Mailbox* changes to your name.) Details about the Mailbox and about sending and receiving correspondence appear throughout this manual.



Catalogs

The Catalogs icon opens to show all the catalogs to which you have access—AppleTalk, PowerShare servers, and any other services on your network. The “Catalogs and Information Cards” chapter deals with this subject in depth.



PowerTalk Key Chain

The PowerTalk Key Chain keeps others from using your PowerTalk services. It opens to show the services available to you and provides a way to add and remove services. You can also use it to change your Key Chain Access Code as discussed in the next section.

Setting up your system

PowerTalk system software provides different levels of access security. The most basic safeguard is the Key Chain Access Code, your primary PowerTalk identification. Your access code provides access to all your accounts and services. It protects your correspondence by restricting that access.

Until you set up and use your access code, your catalog and mail services are “locked,” that is, inaccessible.

How you set up your system depends on whether you have access to PowerShare servers. If you are not sure, ask your system administrator.

Setting up with a PowerShare server account

If you have access to a PowerShare server, follow these steps:

- 1 Choose **Unlock Key Chain** from the **Special** menu in the **Finder**.



You can also open the Mailbox.

The welcome screen appears.

- 2 Read the screen and click Proceed.

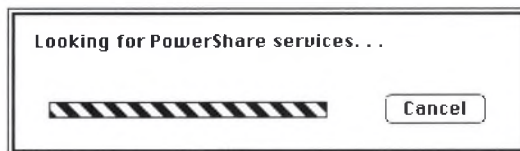


A dialog box appears, asking if you have a PowerShare account.

- 3 Click Yes.

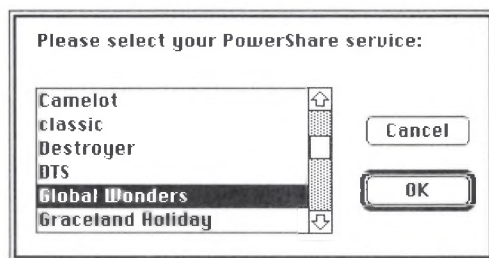


The computer searches for the PowerShare services available to you.



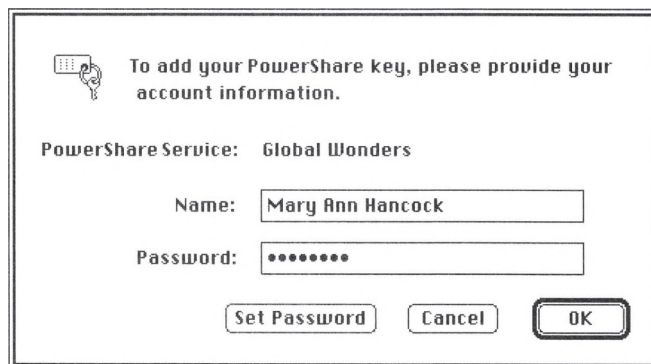
- 4 When the navigation dialog box appears, select the PowerShare service which you want access and click OK.

You can also double-click the PowerShare service's name.



A dialog box appears, asking for account information.

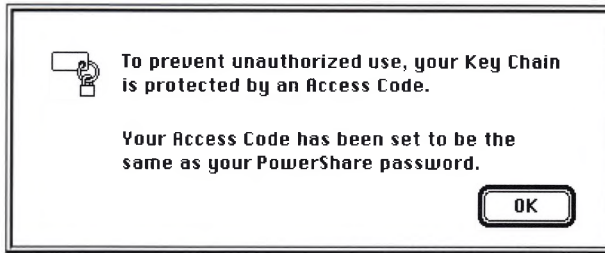
- 5 Type your name and the password of your PowerShare account as set up by your system administrator.



As a convenience to you, PowerTalk software will initially set your Key Chain Access Code to be equal to your PowerShare password. (You use your access code to open all services.) You can change your Key Chain Access Code, as well as your PowerShare password, at any time in the PowerTalk Key Chain.

IMPORTANT Changing your Key Chain Access Code does not change your PowerShare password. You'll need to use your PowerShare password when you check your mail from a computer other than your own. See "Checking Your Mail From Another Computer" for details.

6 When you see the confirmation box, click OK.



After a moment another confirmation box appears with additional information. Click OK to put the second box away.

After confirmation, you have access to your PowerTalk services. The name of your Mailbox changes to show that you are its owner.



Setting up without a PowerShare server account

If you don't have a PowerShare server account, follow these steps:

- 1 Choose **Unlock Key Chain** from the **Special** menu in the **Finder**.



You can also open the Mailbox.

The welcome screen appears.

- 2 Read the screen and click **Proceed**.



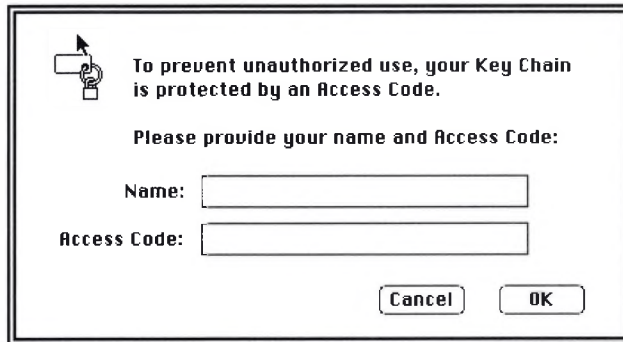
A dialog box appears, asking if you have a PowerShare account.

3 Click No.



A dialog box appears, asking you to set your Key Chain Access Code.

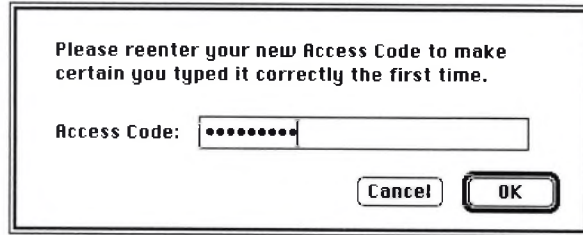
4 Type your name and the access code you want to use.



Here are some tips for choosing an access code:

- It should not be your name.
- The longer it is, the harder it will be to guess. (It must be at least six characters.)
- Mix upper- and lowercase letters and use numbers, as in “4Me!Only%”
- Make it easy to remember and don’t write it down.
- Keep track of which letters are uppercase—the access code is case-sensitive.

- 5 When a confirmation dialog box appears, type your access code again to ensure that you typed it the way you want it and click OK.



You can change your access code at any time in the PowerTalk Setup control panel.

- 6 When you see the next confirmation box, click OK.

As soon as the confirmation box closes, check to make sure that the date, time, and time zone are all set correctly. See “Setting Your System Clock” later in this chapter for details on how to do so.

You now have access to PowerTalk services. The name of your Mailbox changes to show that you are its owner.



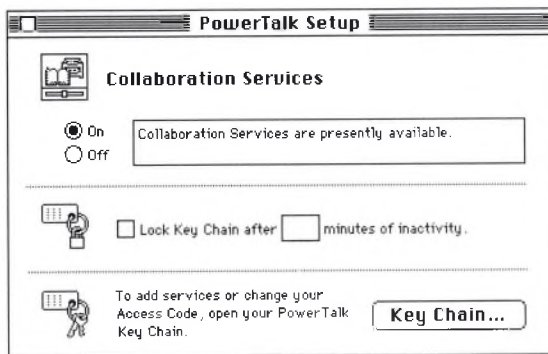
Locking your PowerTalk system

When you give your Key Chain Access Code, you have access to PowerTalk services until you shut your computer down. If you are going to be away from your computer for a while, you can protect your accounts, services, and information while you are gone by choosing Lock Key Chain from the Special menu.



Your services and accounts will be unavailable until you give your access code again.

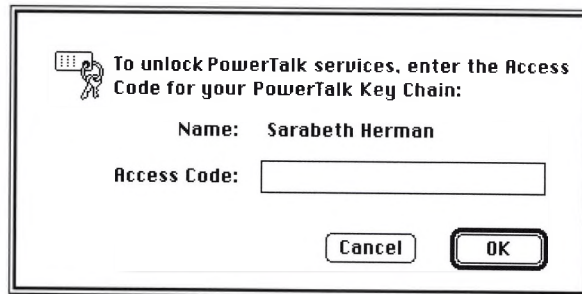
Additionally, you can set your PowerTalk account to lock itself after a given period of inactivity (no key presses, mouse clicks, or mouse movements) by making the proper settings on the PowerTalk Setup control panel.



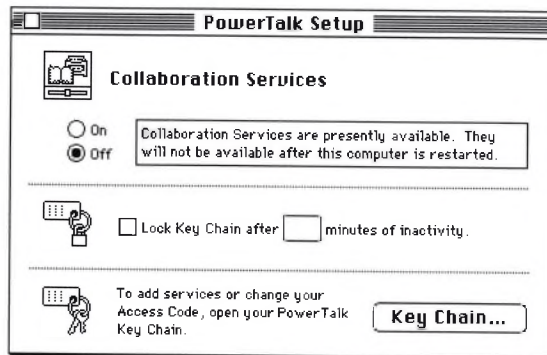
To set a time limit for inactivity, follow these steps:

- 1 Check the box to the left of “Lock Key Chain after.”
- 2 Type the number of minutes of inactivity before PowerTalk should lock itself into the box following the word “after.”
- 3 Close the PowerTalk Setup window.

When you try (or anyone else tries) to open your mailbox or access any collaboration service on your computer while PowerTalk is locked, the system asks for your access code. A dialog box like this one appears:

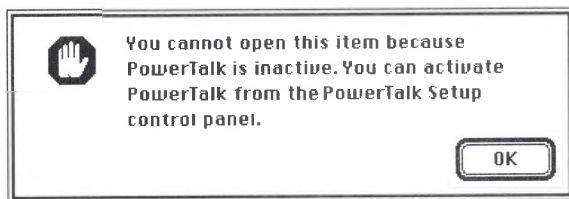


To shut off collaboration services for an extended period, click the Off button in the PowerTalk Setup control panel and restart your computer.



When you choose this option, collaboration services won't be available at all when you restart the computer. (Your Mailbox and Catalogs won't even appear on the desktop.) You'll use this option when you know that you won't be needing PowerTalk services and accounts on a particular personal computer for a while.

An attempt to open the Key Chain icon brings up this dialog box:



To gain access to PowerTalk services again, click the On button in the PowerTalk Setup control panel and restart your computer.

Setting your system clock

You can use PowerTalk software to send and receive correspondence anywhere, anytime. Such correspondence automatically includes the time and date it is sent. If your system clock is set improperly, you'll send mail with the wrong date and time.

You use the Date & Time control panel to set the date and time. Here are the steps:

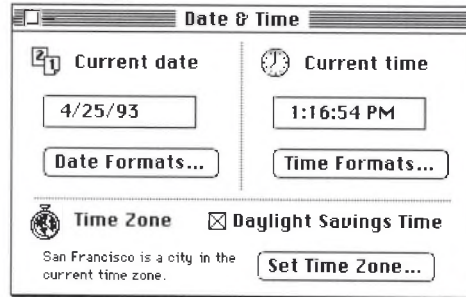
- 1 Choose Control Panels from the Apple () menu.
- 2 In the Control Panels folder, open the Date & Time control panel.



Date & Time

- 3 Check that the information in the panel is accurate, make corrections if necessary, and close the window.

Be sure to verify the Time Zone and Daylight Savings Time settings.



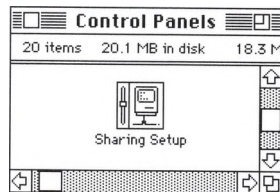
To set the proper time zone, click Set Time Zone and choose a city that you know is in the same time zone as yours.

Naming your computer on the network

If you are on an AppleTalk network, the name of your computer will appear in the AppleTalk catalog, and people can send you mail at that “address” without the need for a PowerShare server. If you name your computer clearly in the Sharing Setup control panel, people can find your address more easily. Many people use their own names in naming their computers (for example, “Scribblemonger’s Quadra”).

To check the name of your computer, follow these steps:

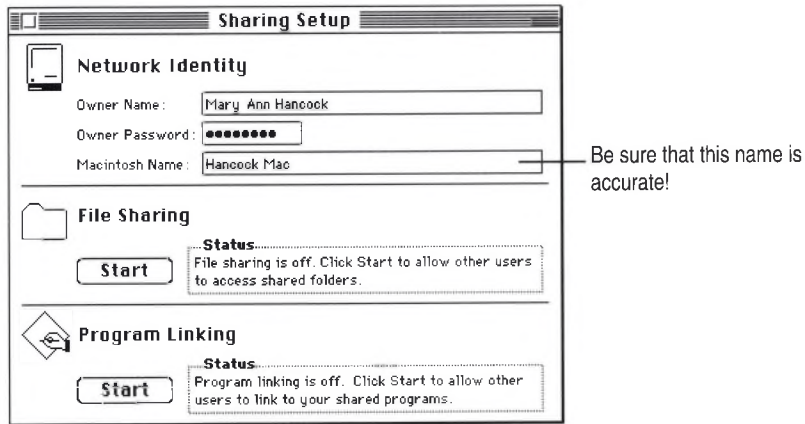
- 1 Choose Control Panels from the Apple menu.
- 2 Open Sharing Setup.



- 3 Add any missing information, or change the current information by selecting and retyping.

Make sure that the name in the Macintosh Name text field is accurate; this information defines your network identity.

IMPORTANT If you have more than one computer on the same network, be certain that the computer names are different.



- 4 Close the Sharing Setup control panel by clicking its close box.

IMPORTANT If you want to use your AppleTalk catalog and the network, be sure that AppleTalk is turned on in the Chooser.

Adding and removing services

You use your PowerTalk Key Chain to add and remove services.

Adding a service

Follow these steps to add a service:

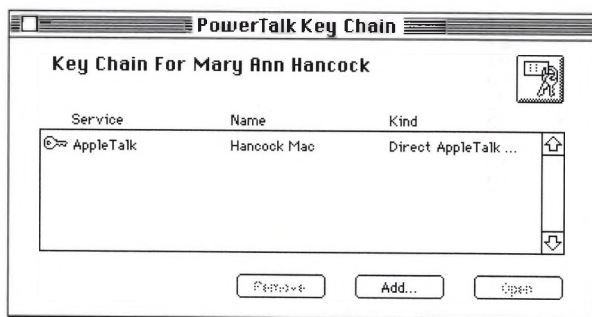
- 1 Open your PowerTalk Key Chain.



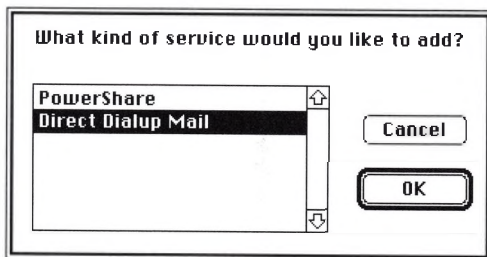
PowerTalk Key Chain

If you haven't already given your Key Chain Access Code, you'll be asked to enter it.

The Key Chain dialog box appears, listing your current services.



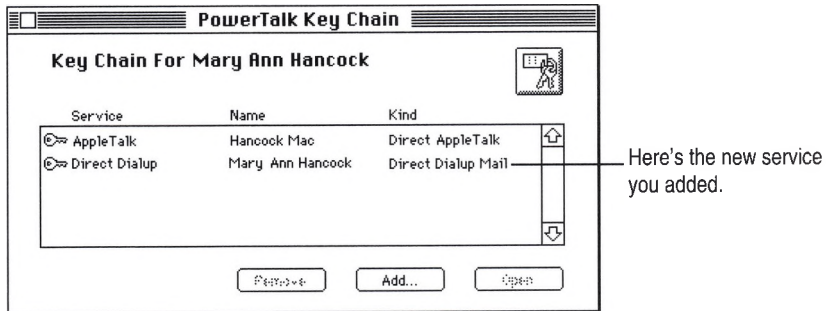
- 2 Click the Add button to bring up a list of available kinds of services.



3 Select the service you want to add and click OK.

What happens next depends upon the kind of service you are adding. For example, if you are adding PowerShare, the system searches for available PowerShare services and prompts you to choose the one you want.

After you have made appropriate choices for the service you are adding, the service you have selected is added to your list of available ones.



Note: Some services require additional setup before you can use them. Consult the documentation that came with the service.

Removing a service

Follow these steps to remove a service:

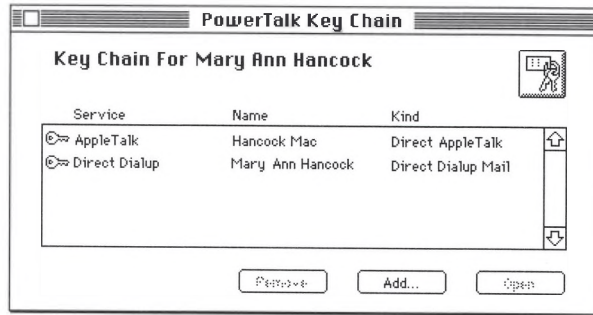
- 1 **Open your PowerTalk Key Chain.**



PowerTalk Key Chain

If you haven't already given your Key Chain Access Code, you'll be asked to enter it.

The Key Chain dialog box appears, listing your current services.



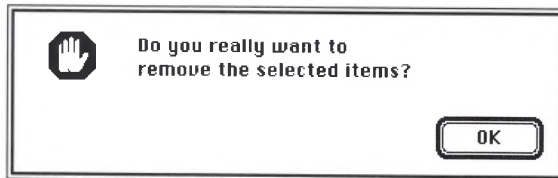
- 2 **Select the service you want to remove.**

The Remove button at the bottom of the dialog box is enabled.

- 3 **Click Remove.**

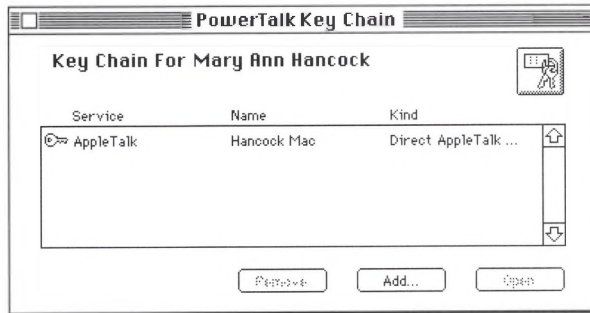
A dialog box appears, asking you to confirm removing the service.

Note: In some cases, you may be presented with additional dialog boxes. See the documentation that came with the service for details.



4 Click OK.

The service is removed and no longer appears in your Key Chain window.



Now that you've set up your PowerTalk system software, the next chapter briefly introduces you to some typical daily tasks.

3

Learning the Basics



This chapter offers a practical introduction to several basic PowerTalk functions. While it doesn't cover all the features in PowerTalk, it does give you a chance to use several of the important ones.

You'll learn how to

- add personal and business information to an “information card”
- add an electronic address to an information card
- send a file
- check for mail in the In Tray
- check the status of mail you've sent
- use and verify digital signatures

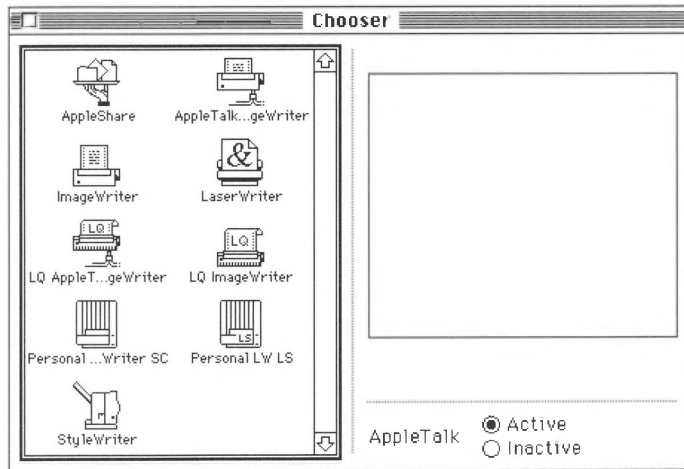
IMPORTANT To work with the tutorials in this chapter, you must have your new system software properly installed and set up. If you haven't already set up PowerTalk, follow the instructions in *What's New in System 7 Pro*.

Is AppleTalk active?

Before you begin, make sure that AppleTalk is active. To do so, follow these steps:

- 1 **Open the Chooser from the Apple menu.**

The Chooser dialog box appears.



- 2 **If the AppleTalk Active button is not selected, click it.**
- 3 **Close the Chooser by clicking its close box.**

Making an information card for yourself

PowerTalk introduces a new kind of document for the Macintosh—an information card. Each information card is a collection of data about a person, place, or thing or a group of people, places, and things. An information card can reside in catalogs available on your desktop, over a network, or anywhere on a disk.

One type of information card is called a user card; you'll be working with this type of card in this chapter. A user card contains information about a specific individual. In this case, that individual is you.

To create a user information card about yourself, follow these steps:

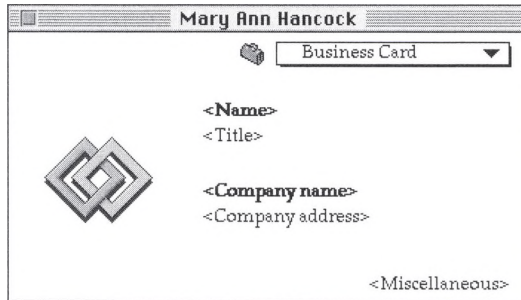
- 1 Select the **Untitled Info Card** icon in the **PowerTalk** folder.



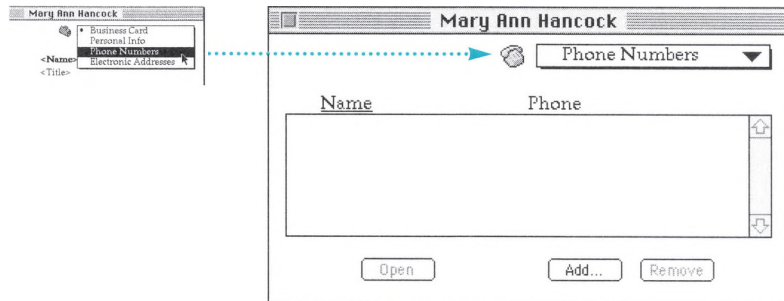
Untitled Info Card

Type your name as its title.

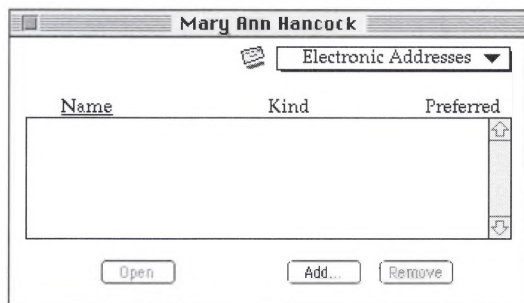
- 2 Open the information card and add your information to the first “page.”



- 3 Use the pop-up menu to switch to the **Phone Numbers** page and add information there.



- 4 Use the pop-up menu to move to the Electronic Addresses page.



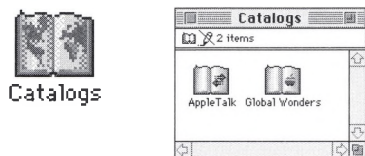
In the next section you'll add your address to this page of the card, so keep it open for now. But first, you'll see how to locate an electronic address.

Locating an address in the AppleTalk catalog

Many catalogs contain directories of users on various kinds of information services. Such catalogs contain the electronic addresses you use to contact people.

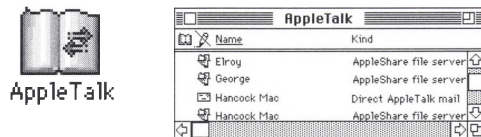
To see the catalog information available on your desktop, follow these steps:

- 1 Open the Catalogs icon on your desktop.



The catalogs you see depend on the service(s) available to you.

- 2 Open the AppleTalk catalog icon.



- 3 If necessary, open folders until you find the Direct AppleTalk mail address of the computer you're using.

If you have File Sharing turned on, you will see two icons—one for AppleTalk and one for AppleShare. The one you want is the one that says “Direct AppleTalk mail address” in the window’s Kind column.

Even if you aren’t connected to a network, you still have access to the AppleTalk catalog. This catalog always contains at least one Direct AppleTalk mail address—yours.

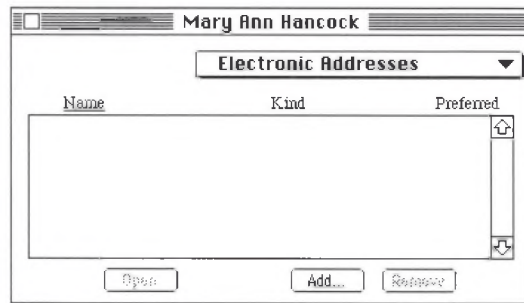
Adding your address to your information card

Information cards for users and groups in catalogs usually contain electronic addresses. Information cards in AppleTalk catalogs contain address information for computers and file servers.

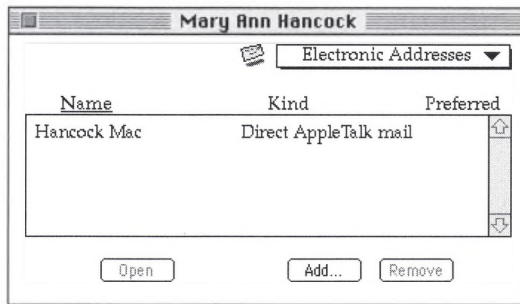
To add your Direct AppleTalk mail address to your information card, follow these steps:

- 1 Drag the icon from the catalog window directly to the address area of your information card.

You may have to move windows around to do it.



Your Direct AppleTalk mail address is now stored in your information card.



2 Close the information card.

In the next section you'll use your information card—which now includes information on where you “live” electronically—to send yourself a file.

Sending a file

Once your information card contains an electronic address, anyone who has a copy of your card (and has access to the same network that you are on) can send you files and folders of any kind. Those files can be anything—documents, applications, even other information cards.

In this exercise, you'll send yourself a file. (Imagine you're doing it from another computer somewhere else on your AppleTalk network.) Follow these steps:

1 Drag any file or folder icon you have handy to your information card icon.



2 When the dialog box asks you if you want to send the file, click OK.

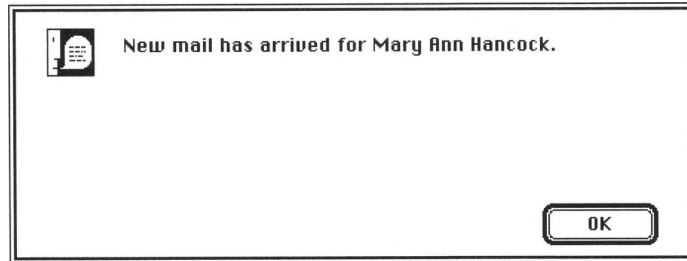
If you haven't entered your Key Chain Access Code yet, you'll be asked to do so.

You have just sent a file to yourself. In the next section, you'll see the place where sent files go.

Checking your incoming mail

All the mail that's sent to you accumulates in your Mailbox until you delete it.

When new mail arrives, the system alerts you with a dialog box.



(Actually, the system can alert you in a number of ways, depending on the settings in the Mailbox Preferences dialog box. Information about mail preferences is covered in “Setting Mail Preferences” in this manual.)

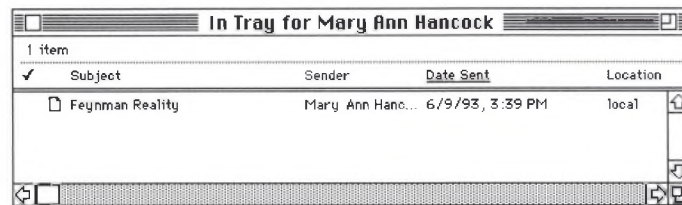
To see the mail in your In Tray, follow these steps:

- 1 Open your Mailbox.



Mary Ann Hancock

Your In Tray appears (as does a new Mailbox menu).

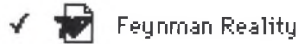


You see the file that you sent to yourself.

2 Open the file in your In Tray.

To open the file, double-click its icon.

A checkmark appears to the left of the file in your In Tray, indicating that you have looked at it.



3 When you are finished looking at the file, close it.

In the next section you'll switch roles again and go back to being the sender of the mail.

Using a Signer

You use a DigiSign Signer to approve a document before you send it to someone. Adding a digital signature assures the integrity of the document.



Mary Ann Hancock Signer

Signing a document

Before you can use your own Signer, you must first go through the process described in “Using Digital Signatures” later in this manual. But you can see how your own Signer will operate by practicing with the Demonstration Signer in the PowerTalk folder. Follow these steps:

- 1 Open the PowerTalk folder if it isn't already open.**
- 2 Locate the Demonstration Signer in the folder.**

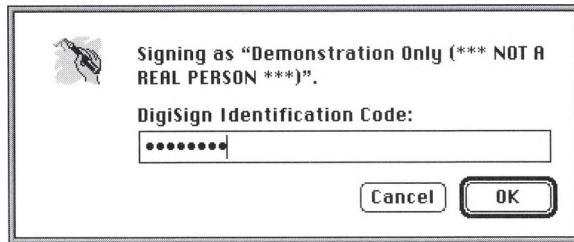


Demonstration Signer

3 Drag any document to the Signer.

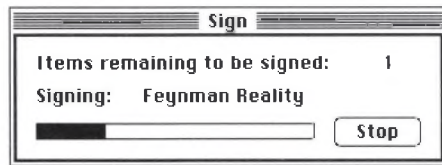
The one you used in the last exercise will do.

A dialog box appears, asking for your Identification Code.



4 Type "password"; then click OK.

(When you get your own Signer, you'll have an Identification Code more obscure than "password"!.) The Signer displays a progress box as it signs your document.



The document is now signed and automatically locked to prevent casual changes to it. Changing a signed document invalidates the signature.

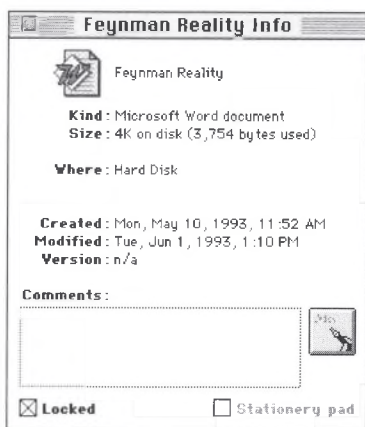
Checking a signature

Ordinarily you would send the document you just signed to someone. For now pretend that you just received such a document and you want to check the signature.

To check the validity of the document you just signed, follow these steps:

1 Open the Info box of the document.

Select the file and choose Get Info from the File menu. The Info box appears.

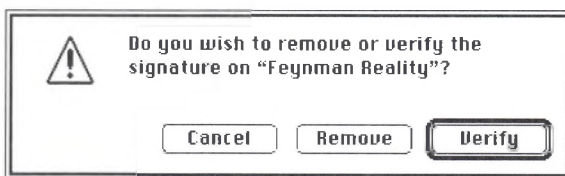


2 Click the signature button at the right of the Comments field.

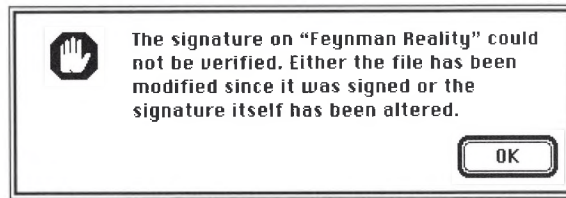
A dialog box appears, asking if you want to verify or remove the signature.

3 Click Verify.

(Later, you can click Remove and see what happens.) After a moment, a dialog box appears showing when the document was signed, who signed it, and additional information. (You may have to scroll to see all the information.)



If someone had changed the document since it was signed, you'd see this dialog box:



A signature button can appear in other places, and clicking the button may display other kinds of dialog boxes. For details about these and other elements of digital signatures see "Using Digital Signatures."

What to do next

In this chapter you've seen how to add information to an information card (including an electronic address you located in a catalog), send a file from the desktop, read incoming mail in your In Tray, and use and verify digital signatures.

PowerTalk can do much more than what you've seen in this brief tutorial. To learn more about PowerTalk, read the other chapters in this manual. If you learn best by doing, follow these suggestions:

- Start using your new mail and catalog services to communicate with people over your network. You can learn much more about using catalogs by following the examples in "Catalogs and Information Cards."
- Use the new AppleMail program to send a letter. Follow the instructions in "Using AppleMail and the Mailer."
- If you have access to software that provides additional services, follow the instructions that accompany that software.

4

Catalogs and Information Cards



This chapter presents background information and typical tasks for locating and using catalog information. You'll learn how to

- locate users and groups
- set up and use a personal catalog
- use information cards

About catalogs and personal catalogs

In PowerTalk a “catalog” represents a collection of information about people and things you can work with, including other computer users; groups of users; shared devices on a network, such as file servers; meeting rooms; equipment; and anything else you can think of. Catalogs provide quick access to information you need as you collaborate with people.

The information contained in catalogs and the levels of organization vary depending on the kind of catalog. A PowerTalk catalog provides information about individual users, groups, and general messages in the form of “information cards.”

Information cards for users generally include a person’s name, postal addresses, electronic addresses, important phone numbers, and other pertinent details. Group information cards contain only aliases—pointers to users’ information cards stored somewhere else.

(Details about creating and using information cards appear in the section called “Setting Up and Using Personal Catalogs” later in this chapter.)

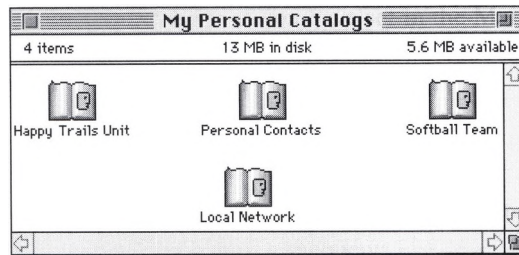
One example of a catalog is an AppleTalk catalog. It provides information about devices, such as individual computers (named by their owners), and file servers.

Personal catalogs

PowerTalk software provides personal catalogs for storing catalog information. Information stored in a personal catalog resides on your hard disk, while information in other catalogs typically lives elsewhere on a network (for example, on an AppleTalk network or on a specialized server). Catalogs can also reside on local read-only media, such as CD-ROMs.

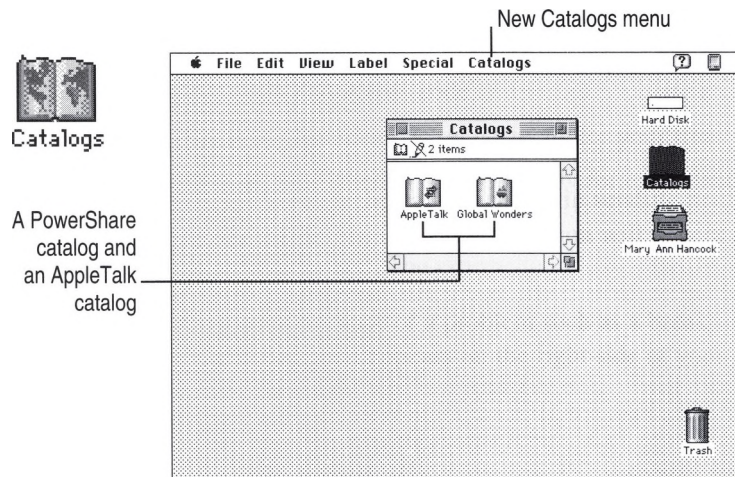
Once you have located a catalog item that you will use regularly, you can drag it to a personal catalog; this will save time later when you need to use it again. Or you can create new information cards and store them in your personal catalog.

There is no limit to the number of personal catalogs you can have or to the ways that you use them. You can store all your personal catalogs in one place, or distribute them as you see fit. The PowerTalk system puts a default personal catalog in the Apple menu for you.



Built-in catalog access

The Catalogs icon on the desktop opens to show an icon for each shared catalog available to you. (Personal catalogs that you create appear elsewhere in the Finder.)



PowerTalk system software provides built-in access for two kinds of shared catalogs: AppleTalk and PowerShare.

If your system is connected to an AppleTalk network and AppleTalk is turned on in the Chooser, you can see AppleTalk users and devices in an AppleTalk catalog window. You can then use built-in mail services (described in this manual) to send files directly to AppleTalk network users listed in the AppleTalk catalog.

If you have PowerShare servers on your network, you first need to use the PowerTalk Key Chain to preselect the catalogs you want to appear.

To see what access privileges you have for a given catalog, look in its Get Info window.



Gaining access to AppleShare servers

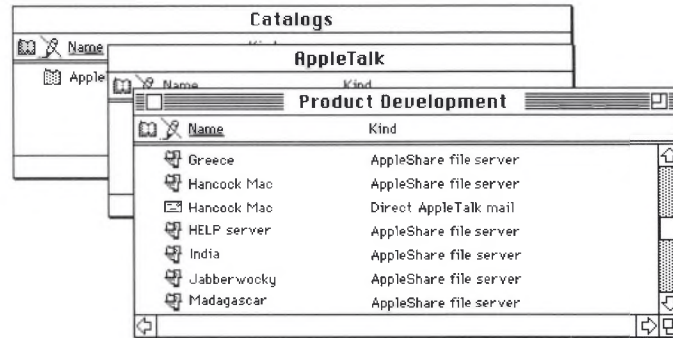
You use the AppleTalk catalog to gain access to AppleShare servers. Follow these steps:

- 1 **Open the Catalogs window.**

You'll see the AppleTalk catalog.

- 2 **Open the AppleTalk catalog.**

Among other things, you'll see all the AppleShare file servers available to you. (If you have zones, you may need to open one or more folders.)



If there are many items in the window, you'll be able to see the file servers more easily if you choose "by Kind" from the View menu.

3 Open the file server you'd like to use.

You can select the file server's name and then choose Open from the File menu, or you can double-click the server's name.

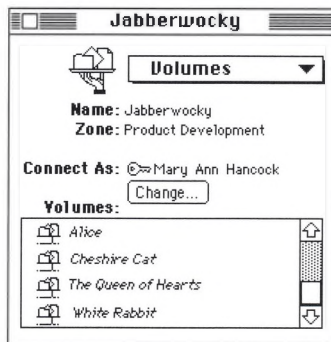
The log-in window appears.



4 Enter your AppleShare password and click OK.

If this server isn't on your PowerTalk Key Chain, a dialog box appears asking if you'd like to add a key for it to your Key Chain. Click Yes to do so. (If you click Cancel, the entire procedure ends and you return to the Finder.)

The information card for the server appears.



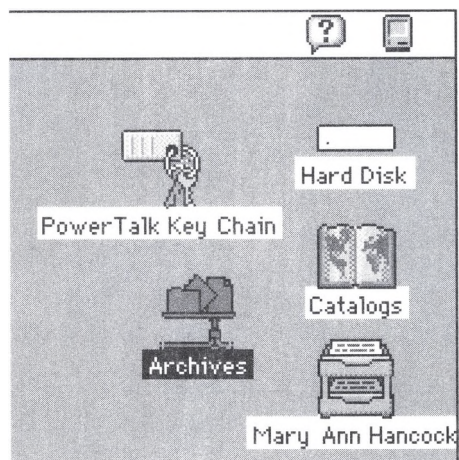
The Volumes window shows a list of the volumes to which you have access.

Opening the pop-up menu displays an additional choice, Server Info. Choosing that item shows the location of the server and information about how to contact the administrator.

Clicking Change brings up the Log-in dialog box so that someone else (perhaps a guest on your machine) can log in.

5 Choose the volume you'd like to use and open it.

Select the volume's name and then choose Open from the File menu or double-click the volume icon.



The volume window opens, and you have access to the files that it contains.

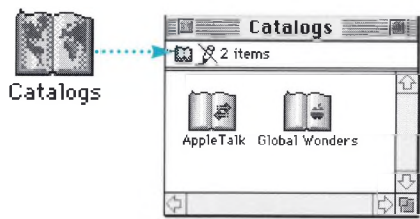
Note: After the volume is on the desktop, you can make an alias for it. In the future you can open the alias without the need to log in again.

Locating catalog users and groups

Browsing catalog windows

To become acquainted with the structure of a catalog and its contents, open any catalog and browse its contents.

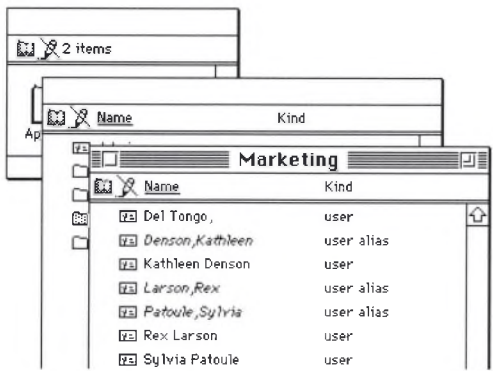
- 1 Open the Catalogs icon on your desktop and then open a catalog of your choice.



IMPORTANT If you are not a network user, some catalogs may not be accessible. But you can still create and use personal catalogs. See “Setting Up and Using Personal Catalogs” later in this chapter.

- 2 Open catalog folders and work your way down the various levels.

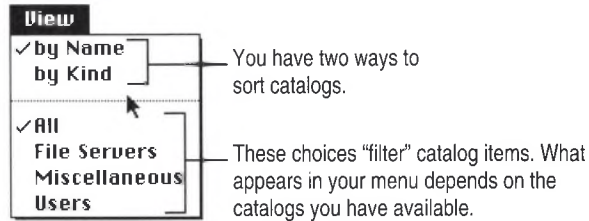
A crossed pencil icon near the top left corner of a window tells you that you can’t add, delete, or rename anything in that window.



In many cases only the catalog's administrator can change the organization or content of any catalog; you won't be able to make changes unless the administrator has granted you specific access privileges. But you can open individual catalog items and copy or drag information elsewhere (for example, to a personal catalog).

Changing the view of items in a catalog

You change the way information is displayed in your catalog—even what information you can see—by choosing the appropriate item from the View menu when a catalog window is active.



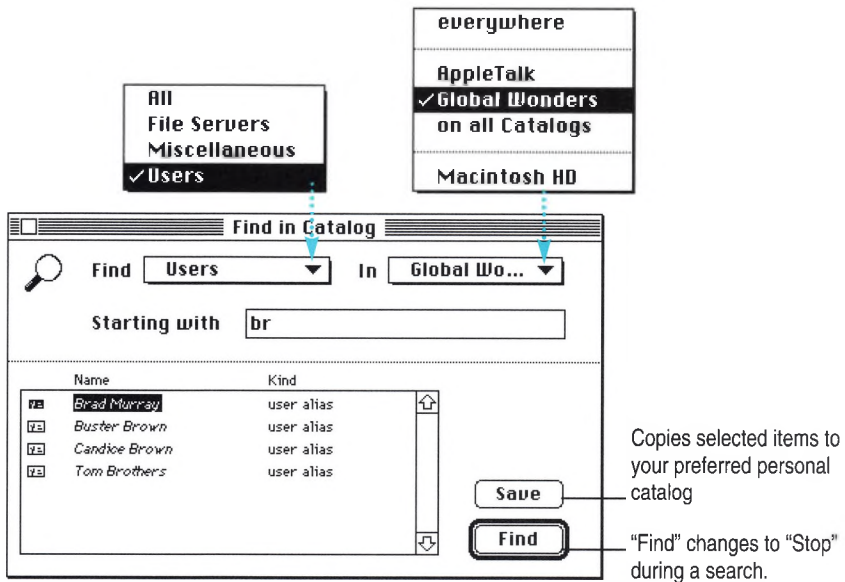
Note: If you add access software for a new catalog to your system, that software may add new items to your Catalogs and View menus. Check these menus when you add such software to see if you have more options.

Finding catalog information by name

When you want to find a catalog item quickly, use the Find in Catalog command. Follow these steps:

- 1 Choose Find in Catalog from the Apple menu.
- 2 When the Find in Catalog dialog box appears, use the pop-up menus to restrict your search.

You can specify where the search should take place, as well as the kind of catalog information to search for.



- 3 Type as much of the name as you know into the "Starting with" text box.
- 4 Click the Find button.

- 5 To copy a found item, drag it where you want it.

For example, drag it to your desktop, a folder, or a personal catalog. (Or you can open it right where it is—just double-click it.)

- 6 When you finish using the dialog box, click its close box.

Setting up and using personal catalogs

The PowerTalk software installation process puts a personal catalog into the Apple menu. You can use PowerTalk system software to create additional personal catalogs, giving them whatever names suit you, to store information on your hard disk for convenient organization and access. Once you copy information into a personal catalog, you can use it whether or not you are connected to a network.

Adding items to a personal catalog

The personal catalog in your Apple menu is empty until you copy or move existing catalog items into it or create new items. There are many ways to add items from a catalog or another location to a personal catalog, including the following:

- Open catalogs and drag icon(s) directly into a personal catalog window.
- Make an alias to a PowerTalk catalog item and drag it to the personal catalog window.
- Choose Find in Catalog from the Apple menu and click Save.
- Use the Mailer's catalog access panel while working in a program. (See "Using the Mailer" later in this manual.)

Follow these steps to add items from a catalog to your personal catalog in the Apple Menu Items folder:

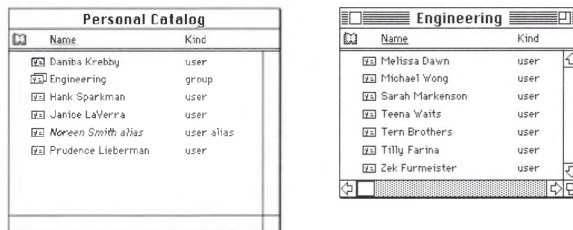
- 1 Choose **Personal Catalog** from the Apple menu.



The Personal Catalog window appears, with a new menu (Catalogs) added to the menu bar.

- 2 Open a catalog window and drag the desired items into the Personal Catalog window.

This makes a copy of each dragged item and places it in your personal catalog.

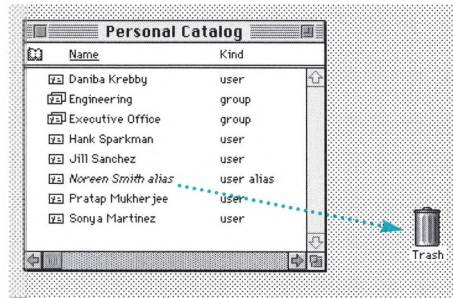


You can also create new information cards. See “Making Information Cards” later in this chapter.

For details about using information cards, see “Using Information Cards” later in this chapter.

Removing items from a personal catalog

To delete any item in a personal catalog, drag the icon to the Trash and empty it.



Creating more personal catalogs

You can have more than one personal catalog. For instance, you might have one that contains only family information, another that has business information, and another that has all the file servers you generally use. To create a new personal catalog, follow these steps:

- 1 Choose Personal Catalog from the Apple menu.**

The Personal Catalog window appears, with a new menu (Catalogs) added to the menu bar.

Actually, you can open any catalog window. Doing so adds the Catalogs menu to the menu bar, which is the goal of this step.

- 2 Choose New Personal Catalog from the Catalogs menu.**

An alert box appears telling you that your new catalog will appear on the desktop.

- 3 Click OK in the alert dialog box.

The alert box closes.

- 4 Type a name for your new personal catalog.



Shetlands Project

You can now drag this catalog to most windows in the Finder.

Indicating a preferred personal catalog

Applications that incorporate PowerTalk software (such as the Mailer, described later in this manual) can easily use items in your “preferred” personal catalog, no matter where on your hard disk you keep this catalog. When you have more than one personal catalog, you can select which is to be the preferred one.



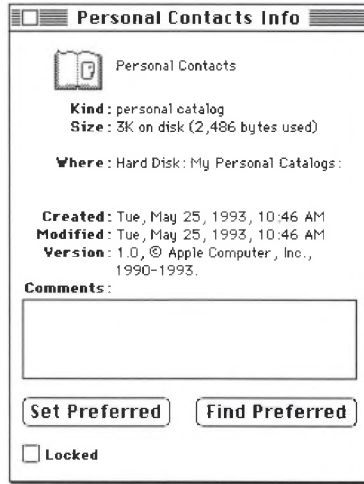
A bookmark icon indicates the preferred personal catalog.

Personal Catalog

To select your preferred personal catalog, follow these steps:

- 1 Select the icon of the personal catalog that you want to make preferred.
- 2 Choose Get Info from the File menu.

The Get Info dialog box for that catalog appears.



- 3 Click the Set Preferred button.
- 4 Close the Get Info box.

IMPORTANT If you check the Locked button in the Get Info dialog box of a personal catalog, you won't be able to make any changes to the contents of that catalog.

You can change your preference anytime by using the same procedure.

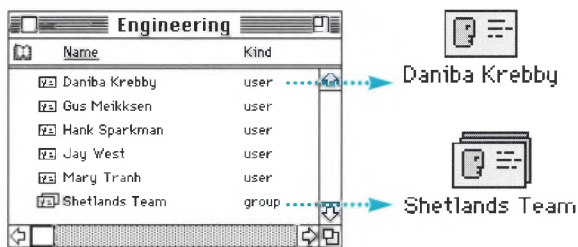
If you want a different personal catalog to appear in the Apple Menu, open the Apple Menu Items folder in the System Folder, drag the Personal Catalog icon out, and drag the new personal catalog icon into the folder. (You can name the new catalog whatever suits your needs.) You can also have more than one personal catalog in the Apple Menu Items folder.

Using information cards

Information cards represent a new kind of Finder “object” that contains catalog information. A user’s information card can contain anything:

- a business title, phone number, and street address
- alternate business contact information
- a home postal address and personal information
- various electronic addresses
- a preferred electronic address
- the user’s picture
- details about areas of interest

The icons you see in any PowerTalk catalog folders are information cards.



Information cards can have information about individuals and groups.

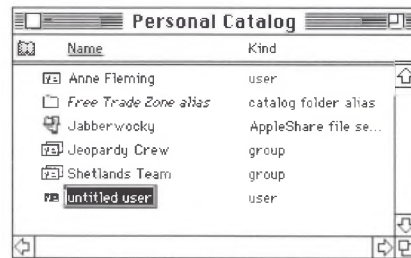
Making information cards

To create a new information card, follow these steps:

- 1 Open a personal catalog.
- 2 Choose the kind of card you want to add from the Catalogs menu.



- 3 Type a name for the icon.

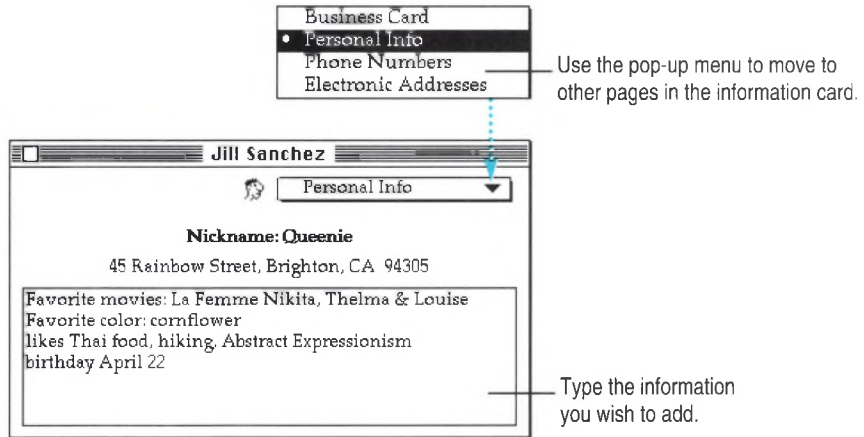


- 4 Double-click the icon to open it.

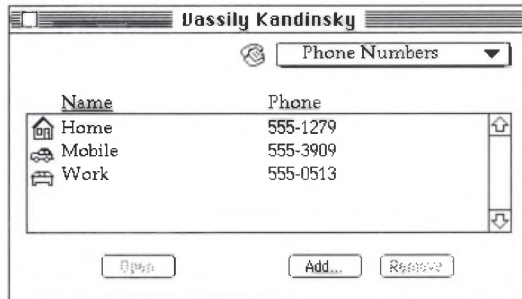
What you see depends on the kind of information card you have created.

5 Type or drag in appropriate information for the kind of card you have created.

Some kinds of information cards have multiple pages. Use the pop-up menu to move through the pages.



Some pages have Add buttons at the card's bottom so you can make multiple entries on the same card.



- 6 When you have finished, close the information card window.

You can store the new information card anywhere on your disk.

Creating group icons

Group icons can be particularly convenient for interacting with teams of people. You can create any number of groups for whatever purposes you like, creating separate icons for each project or team activity.

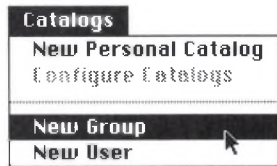
Once you have created a group, you use the group icons as a shorthand convenience. For instance, by choosing a group icon you can send the same piece of mail to every individual in that group.

Follow these steps to create a group information card in the Apple menu's personal catalog:

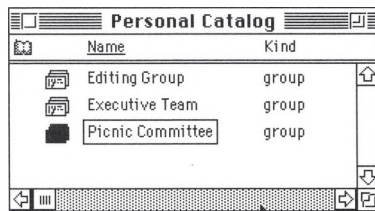
- 1 Choose Personal Catalog from the Apple menu.

The Personal Catalog window appears, adding a new menu (Catalogs) to the menu bar.

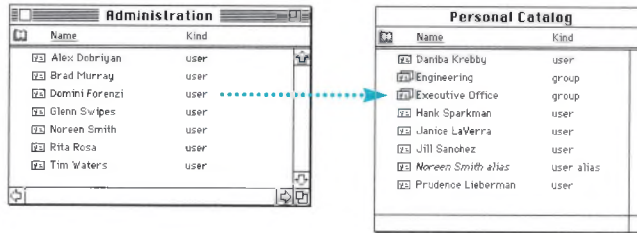
- 2 Choose New Group from the Catalogs menu.



- 3 When the new group icon appears, type its name.



- 4 To add users or groups to the group icon, drag user or group icons to it.



5

Sending and Receiving Mail



PowerTalk system software provides standard ways to send and receive mail by using your Macintosh or PowerBook computer. These built-in services make it much easier to collaborate with other computer users. In this chapter you'll learn how to

- send files, folders, and information cards in the Finder
- check your incoming and outgoing mail
- change the view of your mail
- add, use, and remove “tags” for categorizing mail
- change the way the system handles mail
- check your PowerShare mail from another computer on the network

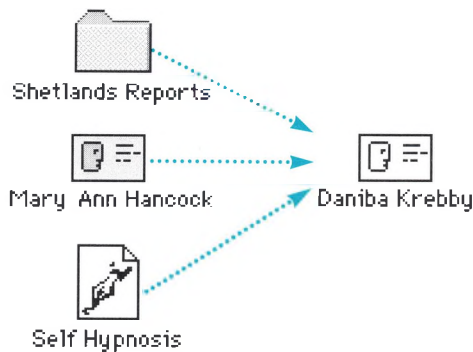
About built-in mail

These new services are now integrated into your Finder:

- You can send files and folders by dragging them to information cards that contain addresses—the system does the rest.
- You can open a mailbox on your desktop to see an In Tray listing your incoming mail and an Out Tray showing the mail you've sent.
- If you have an account on a PowerShare server, you can check your PowerShare mail from another computer on your network.

Sending mail

You can send folders, files, and even information cards to other users directly from the Finder. You do so by dragging items to any user or group information card with a valid address.



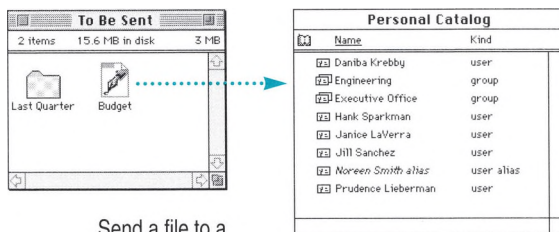
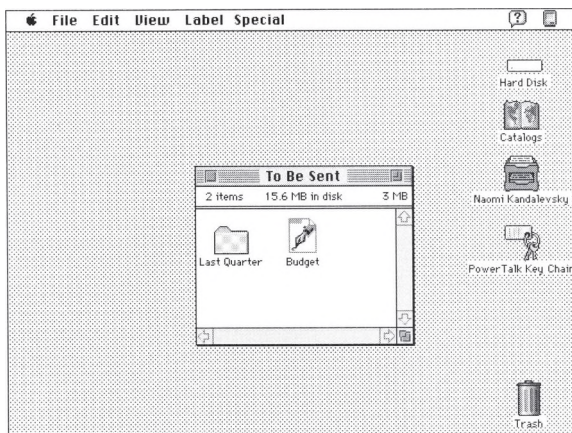
To send files or folders in the Finder, follow these steps:

- 1 **Select the files or folders to be sent.**

You can select more than one item to send to the same destination at the same time.

2 Drag the selected files to a user or group information card icon.

The information card icon can be anywhere—on the desktop, in a folder, in a catalog, even in the Found Items field of the Find in Catalog dialog box.

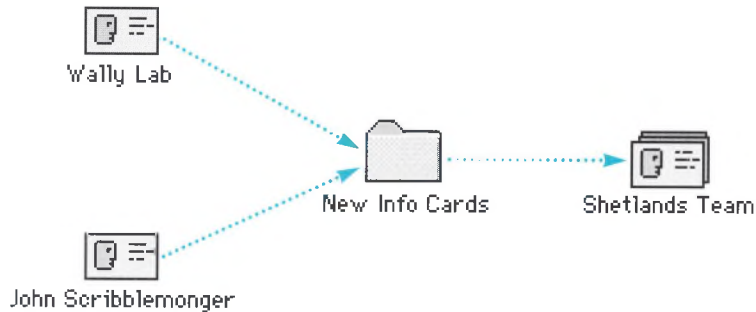


Send a file to a group icon.

3 Click OK in the confirmation dialog box that appears.

You can also create letters and send them, with or without files or folders attached, by using the AppleMail application. See “Using AppleMail and the Mailer” for details.

Note: You can't send an information card by dragging it directly to a group icon. If you do so, the system assumes that you want to add the item to the group. To send information cards to everyone in a group, first put the cards in a folder, then drag the folder to the group icon.



Checking incoming mail

The Mailbox contains all your incoming mail in a window called the In Tray.

Opening mail in your In Tray

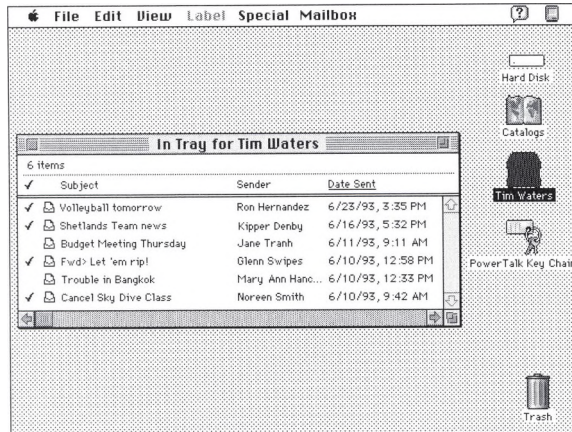
To see your In Tray and open mail, follow these steps:

1 Open your Mailbox.



If your PowerTalk Key Chain is locked, a dialog box appears asking you to type your Key Chain Access Code to unlock it.

2 Review the list of incoming mail in your In Tray.



Your In Tray can contain all kinds of files sent to you: documents, letters, application programs, fonts, movies, folders, and more.

IMPORTANT When you have a PowerShare account that is unreachable for some reason, you won't see all of your incoming mail until you reconnect with the server. If a triangle alert icon appears just below the Zoom box of your In Tray, you may be able to reconnect immediately. Click the triangle icon, select an item in the dialog box that appears, and then click the Resolve button at the bottom of the dialog box. For more information see "Mail Problems" in Appendix A.

3 To open a piece of mail, click to select it and choose Open from the File menu.

Or just double-click the piece of mail you want to open.

About the In Tray headings

The In Tray has five headings—Subject, Sender, Date Sent, Location, and Priority.

- Subject is either the contents of the letter's subject field or the name of a sent item.
- Location can be “remote” or “local”: when it is “remote,” the mail currently resides on a server; when the location is “local,” the mail resides on your hard disk.
- Priority is set by the sender for a piece of mail sent from AppleMail or from any application incorporating the Mailer (described in “Using AppleMail and the Mailer”).

Changing the View of your In Tray

You change the way information is organized in your In Tray—even what information you can see—by choosing the appropriate item from the View menu when the In Tray is open.

To change the sort order of all the mail displayed in your In Tray, open the In Tray window and choose a new order from the top section of the View menu.



You can also click the appropriate section heading in the In Tray window. (The section heading that defines the order becomes underlined.)

To show only mail that matches a specific criterion, choose an option from the lower section of the View menu.

Note: When you filter mail, many of the items in your In Tray seem to disappear but such mail is merely hidden. To see all the mail again, choose All.

For information on the “with Tag” option, see “Using Tags to Filter Your Mail” later in this chapter.

Adding tags to mail

Tags are keywords that identify and categorize your mail. You can attach one or more tags to each piece of mail in your In Tray; then you can filter the view of your In Tray to show only the items with a particular tag. (See “Using Tags to Filter Your Mail” later in this chapter.)

To add tags to an item in your In Tray, follow these steps:

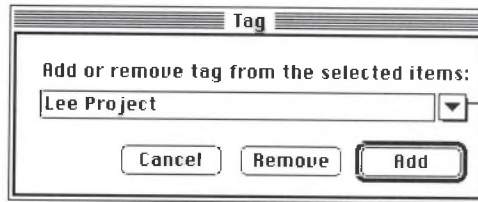
- 1 Click the item to select it.**
To select more than one item, hold down the shift key as you click.
- 2 Choose Tag from the Mailbox menu.**

The Tag selection box appears.

3 Type the tag and click Add.

A tag can be up to 32 characters long.

To use a tag that's already been created, select from the pop-up menu.



This pop-up menu shows other tags that you've already created.

To add more tags to the same item, repeat steps 1 through 3. You can add up to eight tags.

When you use a tag for the first time by typing it in (that is, when you add a tag that doesn't already appear in the pop-up menu), you add that tag to the tags list. The next time you open the Tag window, the tag appears in the pop-up menu.

Using tags to filter your mail

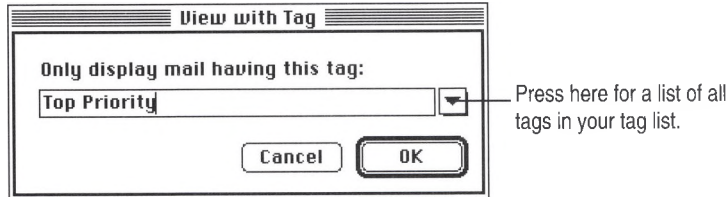
Use the “with Tag” option from the View menu to filter your mail based on tags you have already assigned. Follow these steps:

- 1 Choose “with Tag” from the View menu.

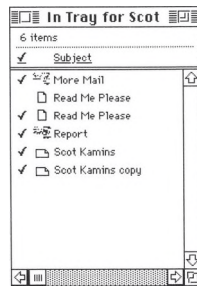
The View with Tag dialog box appears.

- 2 Use the pop-up menu to choose a tag to use as the filter.

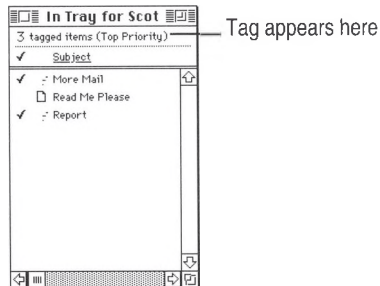
You can also type in a tag.



Only mail already tagged with the phrase that you choose here appears in your In Tray.



All mail visible



Mail filtered via
“Top Priority” tag

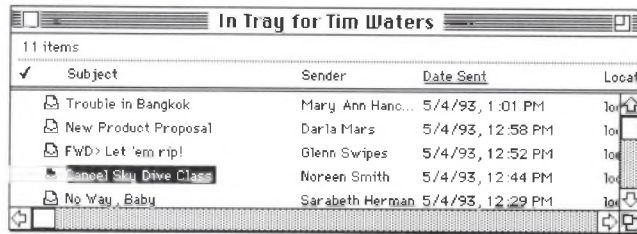
To see all the mail in your In Tray again, choose All from the View menu.

Seeing tags added to your mail

Each piece of mail in your In Tray has an Info box in the Finder. Tags appear in an item’s Info box when you call for the Info box from within the In Tray.

To see tags, follow these steps:

- 1 Select the item in the In Tray whose tag(s) you want to see.

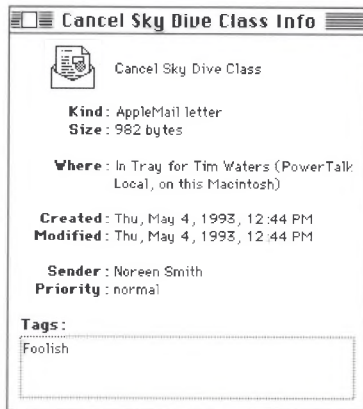


- 2 Choose Get Info from the File menu.

The Info box for that item appears. Note the kinds of information the Info box provides about the item.

- 3 Look in the Tags area at the bottom of the Info box.

The tags you've assigned appear as a comma-separated list. (If there are no tags, the phrase "No tags" appears instead.)



You can't edit or remove a tag in the Get Info window. To remove a tag, see the next section.

IMPORTANT To review tags, you must open an Info box from within your In Tray. When you move a letter to your hard disk, tags are removed.

Removing tags from your mail

You can remove tags from your mail in the In Tray when the tags are no longer meaningful. To remove tags, follow these steps:

- 1 Click the item to select it.

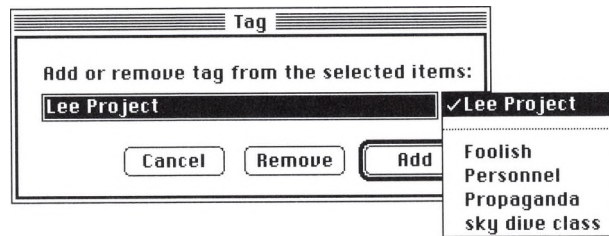
To select more than one item, hold down the shift key as you click.

- 2 Choose Tag from the Mailbox menu.

The Tag selection box appears.

- 3 Use the pop-up menu to select the tag you want to remove.

You can also type the tag.



- 4 Click Remove.

The tag is removed from the item.

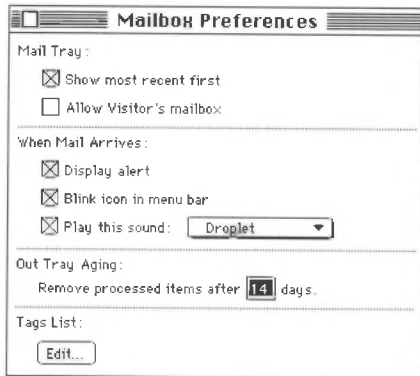
If you need to remove another tag, repeat steps 1 through 4.

Removing tags from your tags list

The collection of tags you see in the pop-up is called the tags list. To remove items from the tags list, follow these steps:

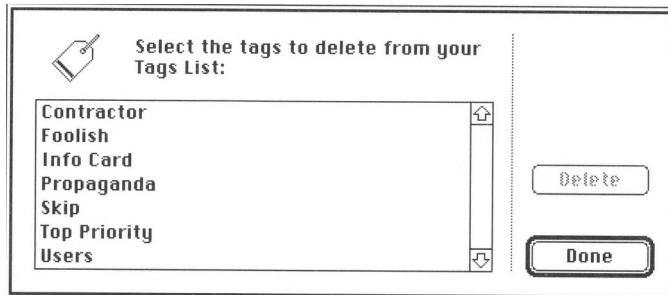
- 1 **Choose Preferences from the Mailbox menu.**

The Mailbox Preferences dialog box appears.



- 2 **Click the Edit button at the bottom of the box.**

A dialog box appears.



- 3 **Click a tag to select it.**

To select more than one tag, hold down the shift key as you click.

4 Click the Delete button.

The selected tags are removed from the tags list and no longer appear in the Tag pop-up menu.

Note: Tags removed from the tags list are not removed from In Tray items to which they have already been attached. When you open the Info box for a piece of mail with a tag that has been removed from the tags list, that tag is added to the tags list again. To remove tags from In Tray items, see “Removing Tags From Your Mail” earlier in this chapter.

5 Click Done to return to the Mailbox Preferences dialog box.

For more information about the Preferences dialog box, see “Setting Mail Preferences” later in this chapter.

Copying mail

To copy a piece of mail, click to select it and then drag it to the desktop or wherever else you want it on your disk.

IMPORTANT The Info box for mail moved out of the Mailbox doesn’t show tags. To see such information, open the Info box from the In Tray.



Info box from the In Tray



Info box from the hard disk

Removing mail

To remove a piece of mail, click to select it and then drag it to the Trash. Be sure to empty the trash to remove the mail.

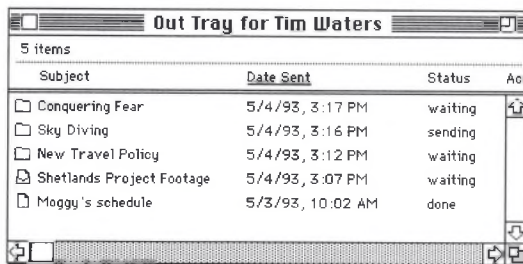
To rescue mail from the Trash before you choose Empty Trash, follow these steps:

- 1 Open the Trash icon.
- 2 Select the item you want to rescue.
- 3 Choose Put Away from the File menu.

Checking outgoing mail

You use your Out Tray to see what mail you've sent.

To check the status of mail you've sent, open your Mailbox and choose Out Tray from the Mailbox menu.



Items in your Out Tray can be:

- *sending*—in the process of being sent
- *waiting*—waiting to be sent
- *done*—delivered from the local computer to the next destination or abandoned after trying repeatedly

IMPORTANT If you are on a network, there is no way to tell whether a letter has actually been delivered and received at its ultimate destination—only that it has gone out over the network. For PowerShare mail, “done” means that the mail has successfully left your machine and reached a PowerShare server.

If you move an item marked “waiting” or “sending” to the Trash, it won’t be sent.

Icons in your Out Tray marked “done” are copies of the sent items, and are stored on your hard disk. The system stores mail in the Out Tray for 14 days, or for as many days as you have set in the Mailbox Preferences dialog box (described later in this chapter). If you don’t need to keep a copy of a sent item, select it and drag it to the Trash.

Changing the view of Out Tray items

The Out Tray offers several ways to sort the listed items. Follow these steps to see options for changing the view:

- 1 **Open your mailbox icon and choose Out Tray from the Mailbox menu.**

Your Out Tray appears.

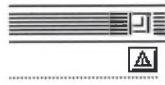
- 2 **Open the View menu and choose one of the items.**



Checking system reports

If the system encounters any technical difficulties in sending mail, receiving mail, or accessing address information, a notification will appear in your In Tray.

When mail isn’t delivered because of a problem such as a break in a server connection, a triangle alert icon appears on the right side of your In Tray.



Click the triangle to see the problem reports. Select any report to bring up more information; you may be able to reconnect immediately by clicking the Resolve button at the lower-right corner of the dialog box.

When a mail item isn't delivered because of a problem with a particular address, you'll see a nondelivery icon in the In Tray.



If you open the letter, you'll see a thumbs-down icon in the Mailer next to the recipient's name. Check to make sure that the address is correct by double-clicking the thumb.

Recipients



If these remedies don't work, see "Mail Problems" in Appendix A.

Using "Send Now"

You use the Send Now command in the Mailbox menu to send selected mail in your Out Tray immediately.

If you use Direct Dialup software (described in Appendix B, "Using Direct Dialup Mail"), Send Now temporarily overrides the settings you made in the Send fields of the Dialup dialog box.

To use Send Now, follow these steps:

- 1 Open your Mailbox and, if necessary, give your access code.**

You're now ready to send the mail in your Out Tray.

- 2 Choose Out Tray from the Mailbox menu.**

Your Out Tray opens.

- 3 Select the mail you want to send now.**

To select several pieces at once, hold down the Shift key as you click each item.

- 4 Choose Send Now from the Mailbox menu.**

Your computer will immediately attempt to send the mail you have selected.

Setting mail preferences

You can set preferences for displaying mail, announcing the arrival of your incoming mail, and letting others check their PowerShare mail from your computer.

To see your options, follow these steps:

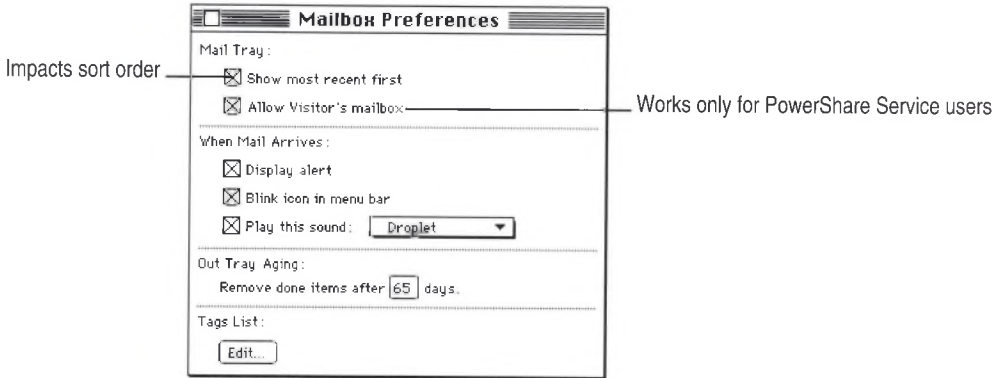
- 1 Open the Mailbox.**

If the Mailbox is already open, click in a Mailbox window to make it active.

- 2 Choose Preferences from the Mailbox menu.**

The Preferences dialog box appears.

3 Set the options to suit your needs.



4 To close the window and save any changes, click the close box.

Changes take effect immediately.

Checking your mail from another computer

If you have a PowerShare account, you can check the mail stored on your PowerShare server from another computer on your network.

Setting up a Mailbox

For you to set up a Visitor's Mailbox, the owner of the computer must do the following:

1 Open the Mailbox.

The Mailbox menu appears in the menu bar.

2 Choose Preferences from the Mailbox menu.

The Mailbox Preferences dialog box appears.

3 Check the "Allow Visitor's mailbox" option.

A new menu item, Visitor's Mailbox, appears in the Special menu. Once the Visitor's Mailbox item is accessible, any number of visitors can log on with their own mailboxes.

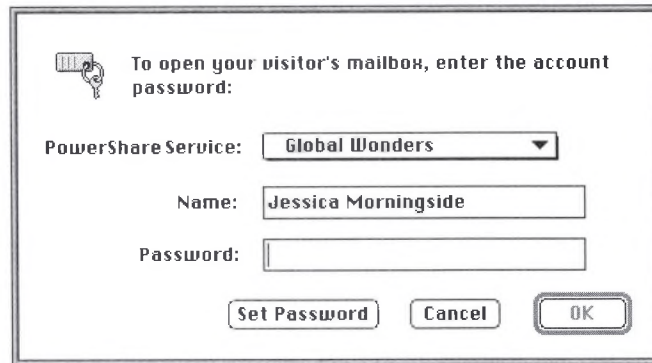
Note: Visitors can see only mail that is currently stored on a PowerShare server.

To log on as a visitor and check your PowerShare mail, do the following:

- 1 **Choose Visitor's Mailbox from the Special menu.**

A dialog box appears asking for access information.

- 2 **Type your name and PowerShare password into the appropriate text boxes.**



To open your visitor's mailbox, enter the account password:

PowerShare Service:

Name:

Password:

- 3 **Click OK.**

Your visitor In Tray opens on the desktop.



There is no built-in limit to the number of Visitor's Mailboxes that can be on the desktop.

To remove a Visitor's Mailbox from the desktop, select it and choose Put Away from the File menu. You can also drag the Mailbox to the Trash. (Visitor's Mailboxes also go away when you shut off or restart the computer.)

Reading mail

You read mail as a visitor the same way you would on your own computer: Double-click the item you want to read.

IMPORTANT When you have finished using your Visitor's Mailbox, be sure to remove it from the desktop. Once you have typed your password, anyone using that computer can read your mail and send mail in your name.

Sending and responding to mail

You send and respond to mail as a visitor the same way you would on your own computer. See "Reading and Replying to Letters" for details.

6

PowerTalk and Your PowerBook



PowerTalk provides a set of features designed for mobile users. In this chapter you'll learn how to

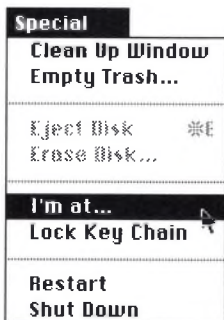
- specify your physical location
- copy mail from a server to your hard disk to take with you on the road
- send mail that you've written while you were off line

Activating mail connections

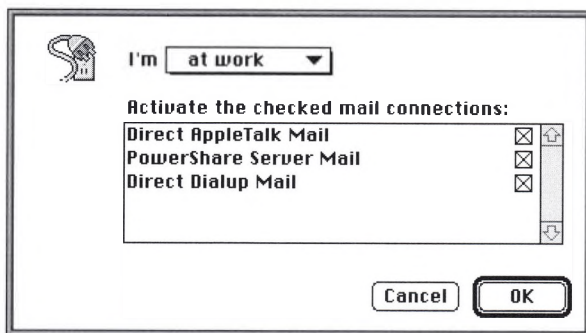
You can specify your physical location—at work, at home, or on the road—to activate appropriate mail connections when you log on. The settings you make, which remain in effect until you change them, determine the services through which you send and receive mail.

To change your mail connection settings, follow these steps:

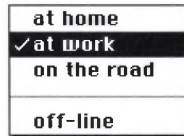
- 1 Choose I'm At... from the Special menu.



A dialog box appears, listing all the services you have installed.



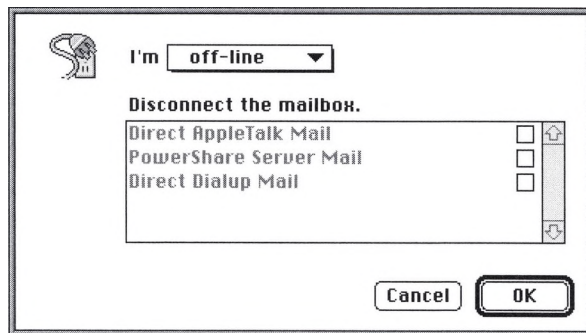
- 2 Use the pop-up menu to select your current location.



- 3 Check the services that you want to activate.

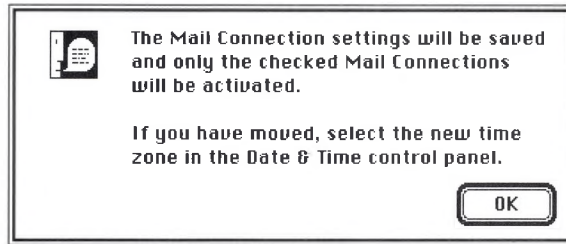
For example, if you were on the road using your PowerBook you might have Direct Dialup Mail checked and other services unchecked.

If you select “off-line,” all services are automatically unchecked for you. (You use “off-line” if you are not connected to any service—for example, when you are in your car, out in the park, or on a plane. While off line you can create letters for later mailing. “Sending” a letter while you are off line is the same as putting that letter in your Out Tray, to be delivered later when you connect with the proper service.)



- 4 Click OK when you have finished making changes to your settings.

If you have made any changes, you'll see this alert box:



Copying mail locally to your In Tray

Mail whose location is marked as “remote” in your In Tray resides on a server. You can copy such mail so that it resides locally in your In Tray before you log off. That way you can take it on the road with you so you can sort, filter, read, and respond to it at your convenience.

To copy remote mail so that it resides locally in your In Tray, follow these steps:

- 1 Open your Mailbox if it isn't already opened.

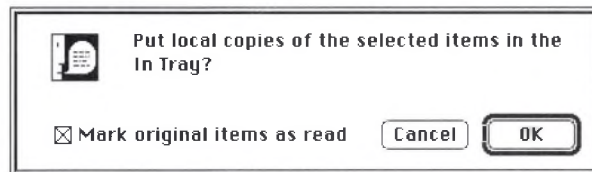
You may have to provide your Key Chain Access Code if you haven't already done so.

- 2 Select the remote mail you want to copy.

To select several pieces at once, hold down the Shift key as you click each item.

- 3 Choose Copy Local from the Mailbox menu.

A dialog box appears.



- 4 If you want to, check the option to have the original items marked as read.
- 5 Click OK.

A copy of the mail you have selected appears in the Mailbox with its location marked “local” (meaning that such mail resides on your hard disk).

The original “remote” mail remains on the server and in your In Tray until you explicitly remove it.

IMPORTANT You can drag local and remote mail from your In Tray anywhere on your hard disk. But in so doing you lose the features (such as sorting, filtering, and tags) that your In Tray provides.

Sending mail written off line

When you “send” mail while you are off line, the mail goes into your Out Tray. Such mail is automatically sent as soon as you reactivate your mail connections (and unlock your Key Chain).

7

Using AppleMail and the Mailer

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You use the AppleMail application to create, send, read, and respond to letters and enclosures. AppleMail incorporates the Mailer, a feature that lets any application incorporating PowerTalk software send documents as mail items.

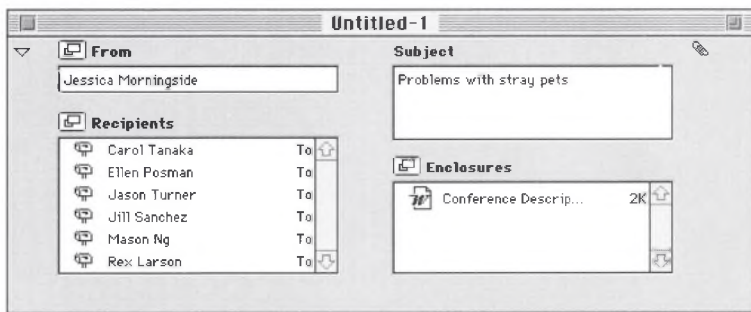
In this chapter you'll learn how to

- create an AppleMail document
- use the Mailer
- send letters
- read and reply to letters
- use keyboard shortcuts
- forward letters

About the Mailer and letters

You use the Mailer to address and send correspondence from an application rather than from the Finder. With PowerTalk software, Macintosh developers can add the Mailer to any application. This means that, when you create a document of any kind in an application that incorporates the Mailer, you can send that document immediately.

The interface for the Mailer is consistent: When you learn to use the Mailer with one program, you'll be able to use it with any other program.



PowerTalk system software comes with a basic letter-writing application, AppleMail, that uses the Mailer. AppleMail introduces a new kind of document, a “letter.”



AppleMail



a letter

Creating an AppleMail document

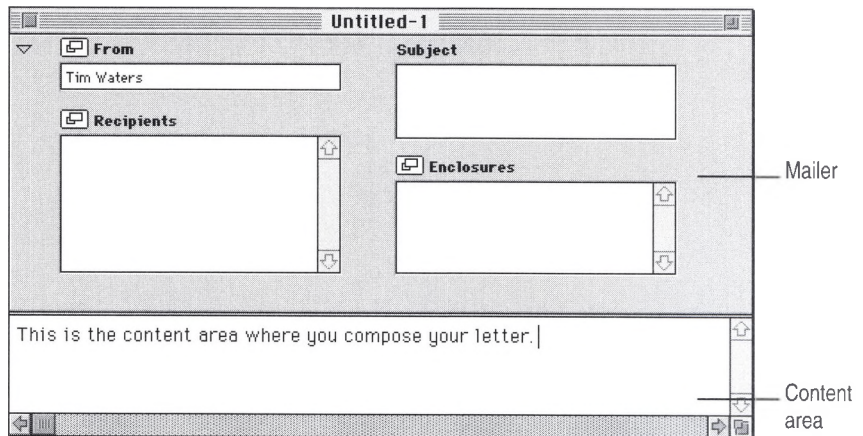
An AppleMail document is made up of two parts—the content area, where you compose your letter, and the Mailer, where you provide sender, subject, address, and enclosure information. To create a new letter, follow these steps:

- 1 Double-click the AppleMail icon to open a new untitled letter.



AppleMail opens with an empty letter in a window.

As you move over the content area, the pointer changes to an I-beam. This indicates that you're in a part of the application where you can type text.



- 2 Type the letter's content.

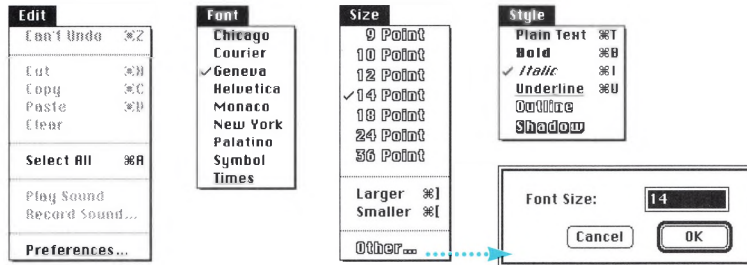
AppleMail uses Geneva 12 as its preset font. You can change the preset font and size by choosing Preferences from the Edit menu; such changes take effect with the next letter you open.

To change the format of a particular letter, or part of a letter, use the Font, Size, and Style menus.

Editing text

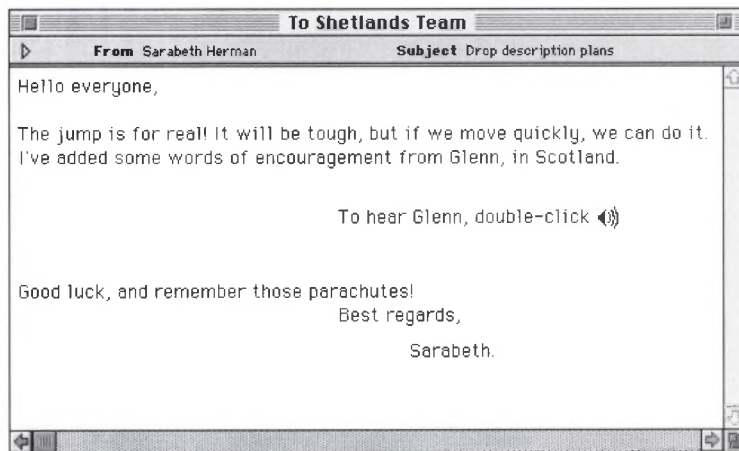
All the standard Macintosh text-editing features are available in AppleMail menus. As with any Macintosh application that provides facilities for editing text, you first select what you want to edit and then use the appropriate menu item (or its keyboard equivalent) to act on the selection.

Here are the primary menus you use when you edit the content field of a letter:



Adding graphics, sounds, and QuickTime movies

You can add graphics, sounds, and QuickTime movies to the content area of a letter. You can copy and paste such objects from other applications, and you can record sounds directly.

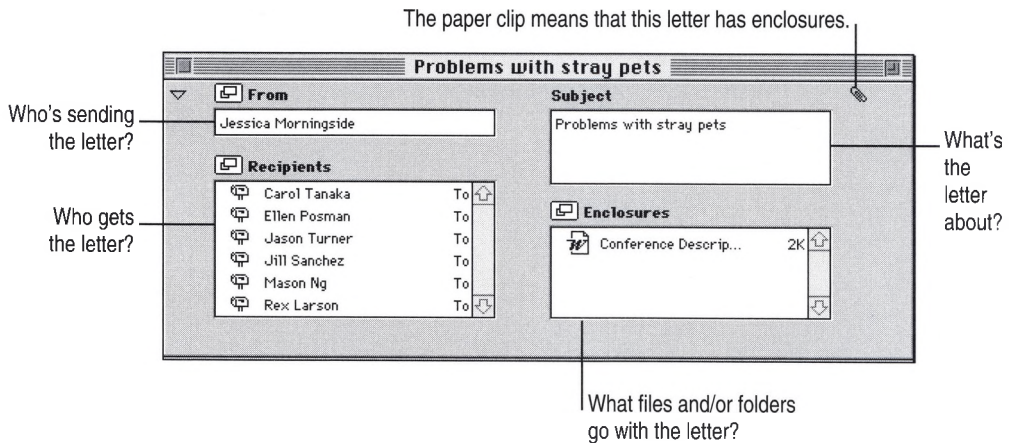


Note: All Macintosh and PowerBook computer models with 68020 or higher microprocessors have the ability to show QuickTime movies. Those models with microphones can record sounds directly.

Using the Mailer

An application that includes the Mailer has standard mail and catalog capabilities built in.

The Mailer has distinct areas where you provide sender, recipient, enclosure, and subject information:

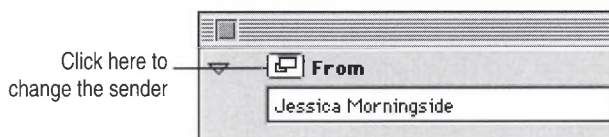


Naming the sender

When you open the Mailer, the From field contains the name of the Key Chain owner (who, in most cases, is the customary user of the computer running the current application) or the name of the person using the currently active guest Mailbox. You can change the name of the sender from within the Mailer.

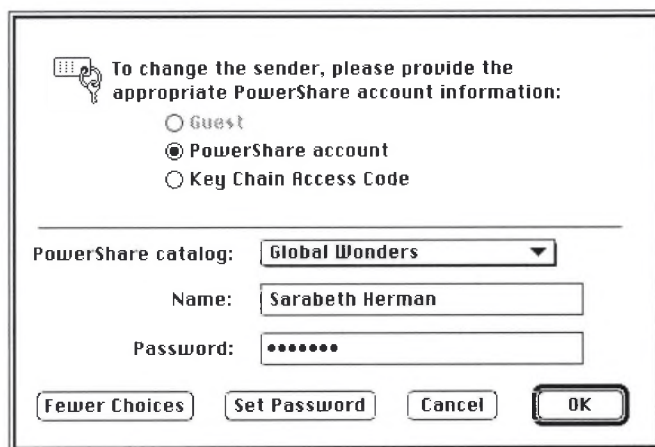
To change the sender, follow these steps:

- 1 Click the button to the left of the From label.

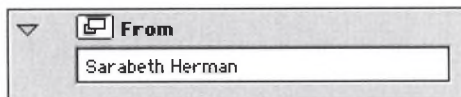


A dialog box appears, asking for account information.

- 2 Type the appropriate information; then click OK.

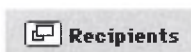


The From field reflects the new sender's name.



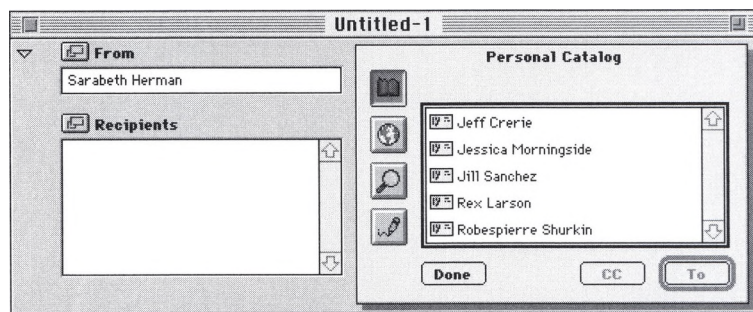
Choosing recipients

To enter the addresses for the recipients of your letter, start by clicking the button to the left of the Recipients label.



You can also drag recipients from a catalog, from the desktop, or from anywhere on your disk directly into the Recipients box.

The Mailer provides a number of additional ways to locate and add recipients. When you click the Recipients button, one of four catalog access panels appears on the right side of the mailer. You use these panels to find and enter your recipients.



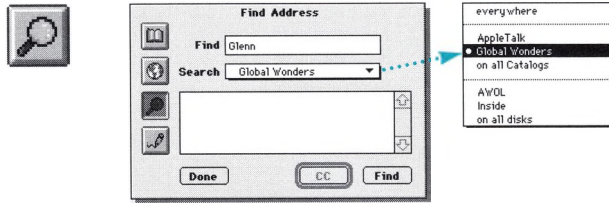
The panel has four buttons, reflecting the different ways you can add recipients.

The top button displays the Personal Catalog panel, which contains all the items in your preferred personal catalog (described in “Indicating a Preferred Personal Catalog” earlier in this manual.)

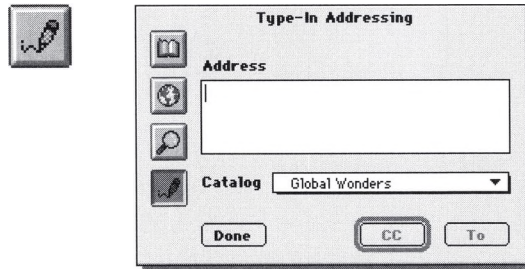


The second button displays the Catalog Browser panel. Use it to locate a recipient by moving through all the disks, folders, and catalogs accessible to you (as indicated in “Browsing Catalog Windows” earlier in this manual).

The third button shows the Find panel. You use it in much the same way that you use Find in Catalog (described in “Finding Catalog Information by Name”).



The bottom button shows the Type-In Addressing panel. Use it when you know the electronic address of the recipient. Choose the proper catalog service from the pop-up menu at the bottom of the panel, and then type the complete mailing address.



Some important addressing guidelines

Here are some procedures you should follow when you type addresses directly into the Mailer:

- Be sure that the address you type is correct. Spelling or format errors prevent mail delivery.
- For Direct AppleTalk mail addresses, the system assumes the address is in your zone if you don't specify one. (It adds "@<yourZone>" to the address.) If the recipient is not in your zone, be sure to supply the correct one.

For example, if the computer's name is "Daniba's Quadra" and that computer is in zone "Global-Eng," the complete address would be Daniba's Quadra@Global-Eng. (Note the "@" symbol immediately before the zone name.)

- The more of a PowerShare address that you type, the less time the system spends searching for it. You can use any of the following formats (where you replace the term in *italics* with real information):

Format	Example
<i><name></i>	Brad Murray
<i><name>@<catalog></i>	Brad Murray@Global Wonders
<i><name>@<catalog>:<folder>:<folder></i>	Brad Murray@Global Wonders:Sales

Be sure to use the "@" symbol immediately before the name of the catalog, and the colon (:) immediately before the name of a folder.

Adding recipients

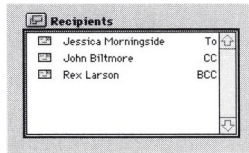
To add a recipient from any recipient access panel to the Recipient box, follow these steps:

- 1 Click the item to select it.

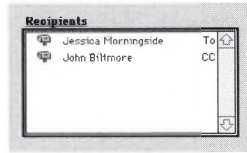
Skip this step if you have entered the address in the Type-in Addressing panel.

- 2 Determine whether you want this to be a main recipient (To), a copied recipient (CC), or the recipient of a blind copy (BCC).

To bring up the Blind Copy button, press and hold the Option key. (Names of BCC recipients don't appear in the Recipients boxes of anyone except the sender.)



**Recipients box,
as seen by the sender**



**Recipients box,
as seen by a recipient**

3 Click the appropriate button.

The address appears in the Recipients box.

Note: You cannot drag a name from a catalogs access panel to the Recipients box.

When you have finished entering recipients, click Done.

To remove a recipient's address from the Recipients box, drag it to the Trash. (You can also select the name and either press the delete key or choose Clear from the Edit menu.)

To make a copy of a recipient's address, select the name in the Recipients box and drag it wherever you want it on your disk.

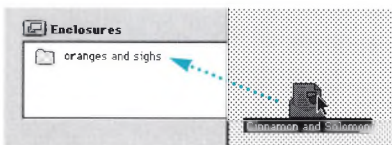
To copy an address from any catalogs access panel to your preferred personal catalog, press and hold the option key; then click the Save button.

Also see “Keyboard Shortcuts” later in this chapter for a list of alternate ways to find and enter recipients.

When you send a letter with an incorrect address and the system cannot deliver it, you'll receive a report in your In Tray.

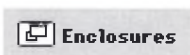
Adding enclosures

You can enclose any file, application, or folder in a letter. The simplest way to add an enclosure is to find it on your hard disk and drag it to the Enclosures box.

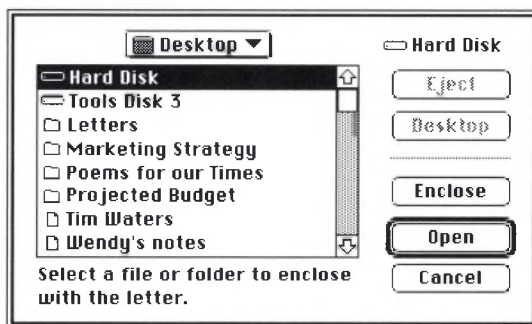


To add an enclosure by navigating to it, follow these steps:

- 1 Click the button to the left of the Enclosures label.



A navigation dialog box appears.



- 2 Navigate through the system until you find the enclosure you want to add.

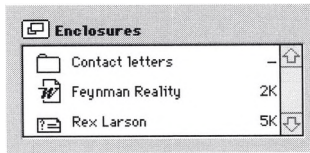
You navigate the same way you would if you were looking for a file or folder in any Macintosh application.

- 3 Click Enclose.

Or double-click the file name.

4 Repeat steps 1 through 3 for each attachment.

You can add up to 50 enclosures.



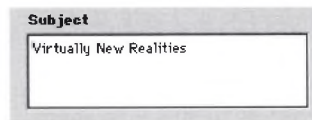
When you add enclosures to a letter, a paper clip appears on the right side of the Mailer.



Indicating the subject

You need to add a subject in the Mailer before you can mail your letter.

To add a subject, click in the Subject box and type.



You cannot send a letter without a subject.

Printing options in AppleMail

You can print letters before or after you send them, and you can print letters you receive. The Print dialog box has two special options—Print Mailer and Print Footer.

Print Mailer creates a cover page for your letter. The cover page contains the From, Recipients, Subject, and Enclosures fields.

Print Footer prints the From and Subject fields, plus the page number, at the bottom of each page of the letter.

Saving letters in AppleMail

To save a letter, follow these steps:

- 1 Choose the appropriate item from the File menu.

File	
New	⌘N
Open...	⌘O
Letterheads...	⌘L
Close	⌘W
Delete	⌘D
Save	⌘S
Save As...	
Save As Letterhead...	
Save As Text...	
Page Setup...	
Print...	⌘P
Quit	⌘Q

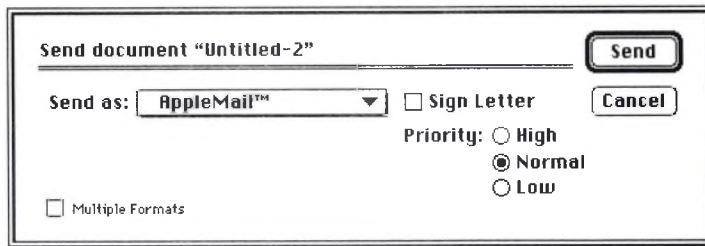
- 2 Use the dialog box that appears to choose a location for saving your letter and then click the Save button.

If you choose Save As Letterhead, you'll see a different dialog box. See "Using Letterheads" later in this chapter for details.

When you choose Save or Save As, you save the letter (including any graphics) as well as the Mailer information. When you choose Save As Text, only the text of the letter is saved; all formatting, graphics, and Mailer information is lost.

Sending letters

To send your letter, choose Send from the Mail menu. The Send dialog box appears.



“Send as” options

The “Send as” pop-up menu shows the formats in which you can send your letter’s content. The options vary from application to application.

AppleMail format is a standard that allows AppleMail-compatible applications to open and edit a letter. When you send a letter in AppleMail format, recipients can copy and edit the text, graphics, sounds, and movies included in that letter. (To do so, the recipients themselves must have a copy of AppleMail, or any application that understands AppleMail format.)

When you send a letter as a snapshot, you are sending a picture of the letter. Recipients can’t edit or use the individual parts—text, sounds, or movies—although they can copy and paste the entire letter. This format is useful when the page layout is important, when you are sending your mail through a fax gateway, or when you suspect that the recipient doesn’t have the application that created the letter.

Note: Some applications have an additional proprietary format. For example, a spreadsheet application may use its own spreadsheet as a letter content format.

Applications that incorporate the Mailer may or may not have AppleMail and/or snapshot formats, in addition to their own proprietary format.

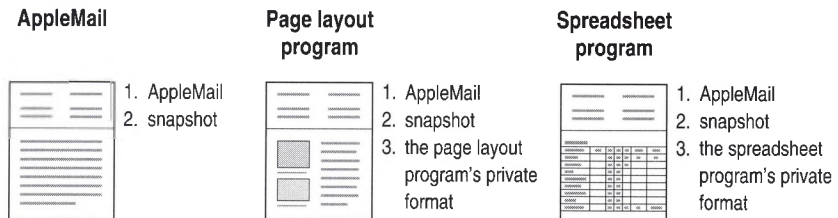
Note: The formatting options affect only the letter. They have no impact on enclosures.

Multiple formats option

Check the Multiple Formats box to send the letter in more than one format; then check the boxes next to the formats you want to use.

☒ Multiple Formats

Applications that incorporate the Mailer can send documents in any combination of formats. (AppleMail has only the AppleMail and snapshot formats.)



Usually you send a letter in multiple formats when you are concerned that the recipient doesn't have the application you used to create the letter.

Sending a letter in multiple formats makes the letter take up more disk space, but it presents a better opportunity for all recipients to see what the original document looks like and to use its contents.

Priorities option

The priority that you check appears in the recipient's In Tray. It indicates the relative importance that you, the creator of the letter, place on its being read.

Priority: ☐ High
☒ Normal
☐ Low

The priority that you set has no impact on how the letter is handled by any mail system or server that transports it.

Sign Letter option

A digital signature is an assurance to recipients that the letter they received was signed by you and has not been tampered with since.

☐ Sign Letter

If you have a DigiSign Signer file, you can check the Sign Letter checkbox to add a “digital signature” to the letter. The first time you use this option, the system prompts you for the location of the Signer file; from then on, that file is used as the default Signer. The Sign Letter checkbox is the only setting retained from mailer to mailer.

See “Using Digital Signatures,” for information about getting and using a Signer file.

IMPORTANT If you have a PowerShare account, you can be certain that a letter’s source is genuine even if it doesn’t have a digital signature. Letters that have passed through only PowerShare servers on their way to you have a seal to the left of the sender’s name in your In Tray. The seal guarantees that the sender’s name has not been altered since it was originally sent.

In Tray for Sarabett			
5 items			
✓	Subject	Sender	Date Sent
✓	 New Realities	 Ed Grimle	4/17/93

Using letterheads

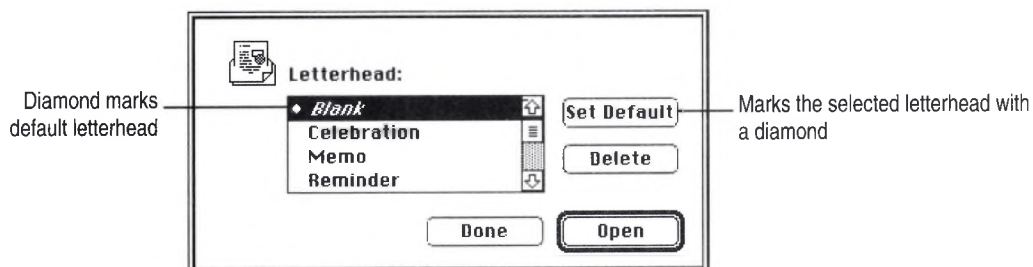
Letterheads are AppleMail stationery that can act as templates you use frequently. You can create and save letterheads that are addressed, or that have prewritten content or subject fields or enclosures. (Just fill in the proper Mailer segments or content before creating the letterhead.)

A few sample letterheads are included with the AppleMail application, and you can make your own.

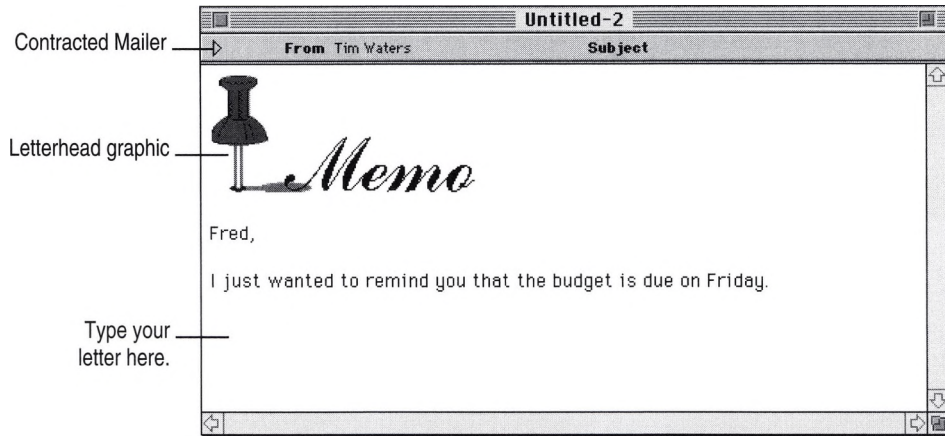
To see your options for using letterheads, choose Letterheads from the File menu.



The Letterhead dialog box has options for opening a letterhead, removing letterheads from the list, and selecting a default (standard) letterhead. (The default letterhead is automatically used whenever you choose New.)



Once you open a letterhead, you add content just as you do in any blank document.



To add a new letterhead, follow these steps:

- 1 Prepare the design in a letter exactly as you want it to look.**

You can paste whatever you want from other applications. Be sure to leave the insertion point where you want to start typing each time you use the letterhead.

- 2 Set up the Mailer (described earlier in this chapter) with whatever recipients, subject, and enclosures that you want to be part of the letterhead.**

To create a letterhead with only the Sender field filled out, be sure that the other Mailer fields are empty.

3 Choose Save as Letterhead from the File menu.

The Letterhead dialog box appears.



4 Type a name for the letterhead and click OK.

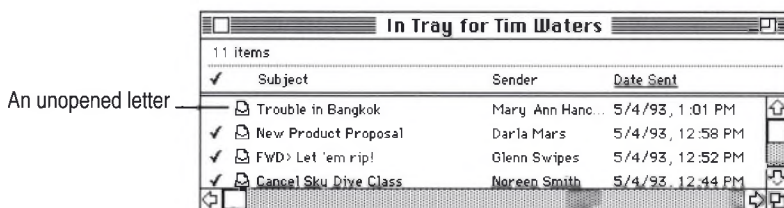
Your new letterhead is added to the letterhead list.

Letterhead stationery is saved in the Preferences Folder inside the System Folder.

IMPORTANT Everything that you have in the letter and the Mailer is saved with the letterhead.

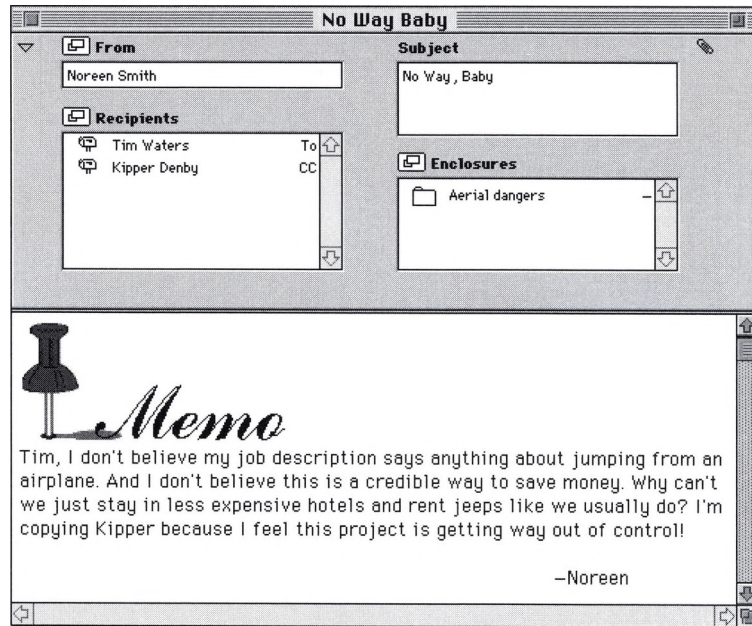
Reading and replying to letters

A letter's icon appears in your In Tray just like the icons of any other files or folders sent to you. To read a letter, double-click its icon.



The application that created the letter opens so that you can read your mail. (If you don't have the application that created the letter, AppleMail opens instead.)

A paper clip near the top right corner indicates that the letter has enclosures.



IMPORTANT You can open enclosed files directly in the Enclosures box by double-clicking them. Or you can drag them to another location.

Choosing a letter's format

When a letter is sent in multiple formats (described in “Multiple Formats Option” earlier in this chapter), you can choose the format in which the letter will appear in the AppleMail content area. You do so by making a choice from the Format menu.

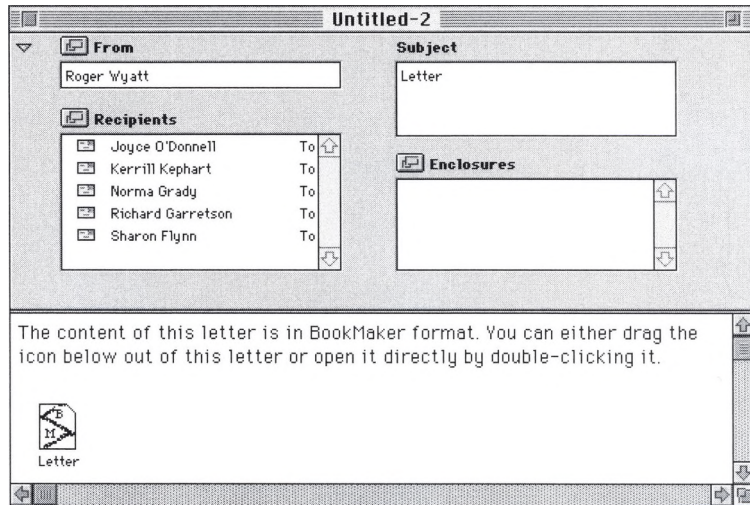


The Format menu always has at least two items in it, AppleMail and Snapshot (although one or both might be grayed out). Your available choices depend on the formats the sender used for the letter.

Sometimes a third choice appears in the menu—a “native” format. This is the format that the application sending the letter uses to create its documents.

For example, if the sending application is BookMaker (an imaginary PowerTalk-aware word processor that incorporates the Mailer), the person sending you the letter might have written it in BookMaker format. In such a case, one of the options in the Format menu would be BookMaker.

The icon for the BookMaker document appears in the content area. To open the letter, you either double-click it in the content area or drag it to your hard disk and open it there.



To read a letter in the native format you must have your own copy of the creating application, or some other application capable of reading the creating application's documents. Otherwise you need to choose another format from the Format menu.

Answering a letter

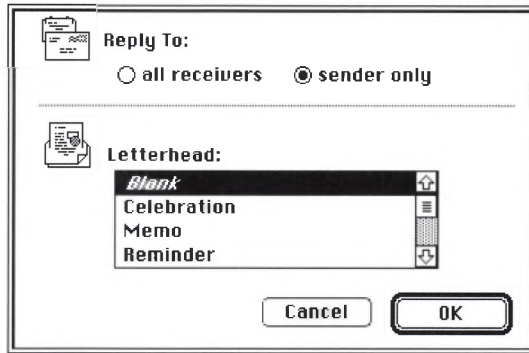
To reply to a letter, follow these steps:

- 1 With the letter's window active, open the Mail menu.



2 Choose Reply.

The Reply To dialog box appears.



3 Make any necessary changes to the dialog box and click OK.

A new letter appears so that you can respond. Your name appears in the From field, the sender's name appears in the Recipients box, and the subject, preceded by Re>, appears in the Subject field.

4 Type your reply in the content area of the new letter that appears, and add any additional recipients or enclosures in the Mailer.

You do this the same way that you create a new letter (described in “Creating an AppleMail Document” earlier in this chapter).

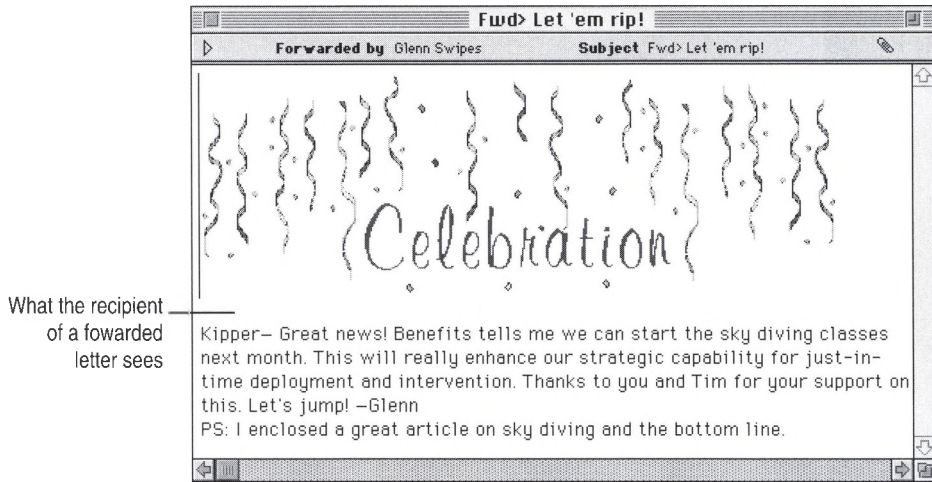
5 Choose Send from the Mail menu and use any options that you wish in the Send dialog box.

To continue reading mail by opening the oldest unread letter in your In Tray, choose Open Next Letter from the Mail menu.

Forwarding letters to other users

You can forward mail you receive, changing the content and enclosures as necessary.

Note: If you make any changes to a letter sent in a native format, that format may be lost. Be sure to forward such a letter in multiple formats (described earlier in this chapter).



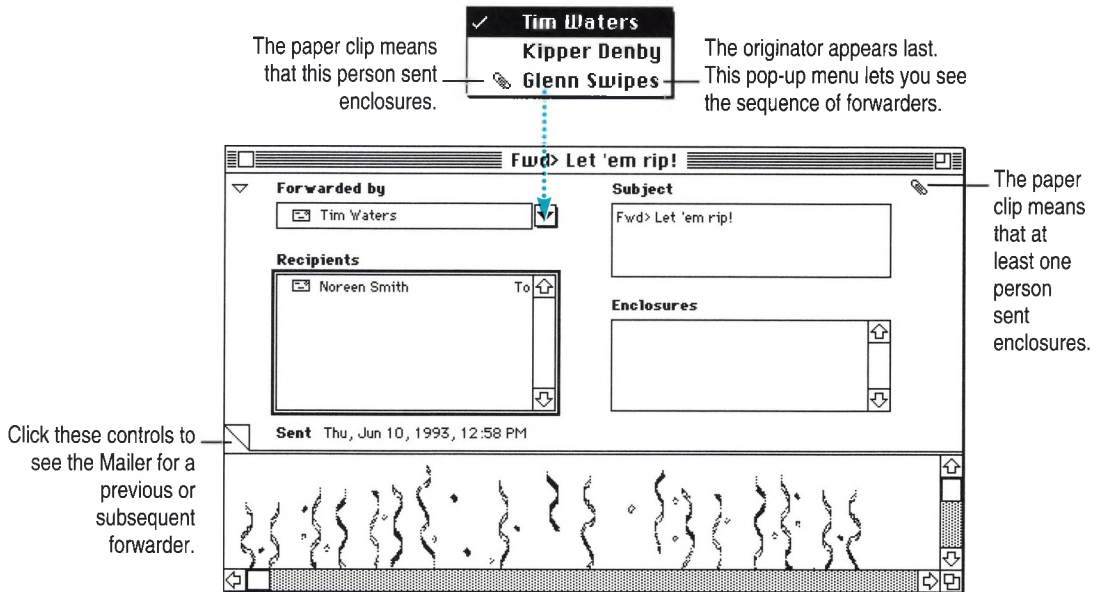
To forward a letter, follow these steps:

- 1 **Open the letter by double-clicking its icon in the In Tray.**
- 2 **Choose Forward from the Mail menu.**

A new Mailer form appears on top of the original one with the letter's old title preceded by Fwd>.

3 Add the forwarding addresses and make any other needed changes in the forwarding Mailer.

Change the content of the letter if you want to.



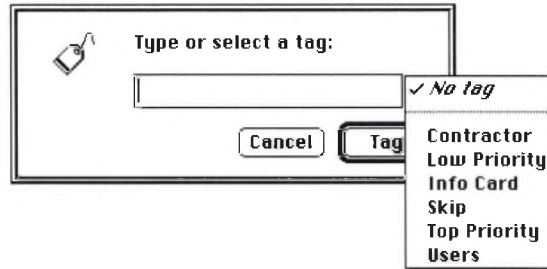
Note to digital signature users: If the original letter has been signed by the sender and you start to change the content, the system presents a dialog box reminding you that you are about to invalidate the signature. If you don't want to do this, click Cancel to keep the content intact and the signature valid.

4 Choose Send from the Mail menu and use any options that you want in the Send dialog box.

Adding tags

Tags are keywords that identify and categorize your mail. You can attach one or more tags to each piece of mail in your In Tray directly from the Mailer. Then you can filter the view of your In Tray to show only those items with a particular tag.

With the letter open, choose Tag from the Mail menu. When the Tag dialog box appears, type a tag name or choose one from the tags list pop-up menu.



For more information on tags, see “Using Tags to Filter Your Mail” earlier in this manual.

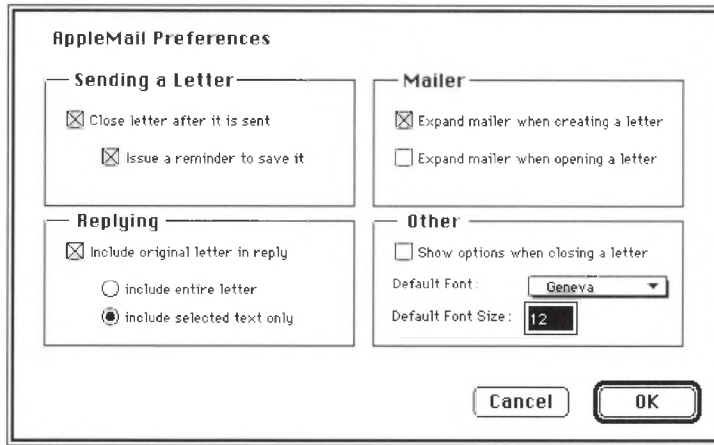
Setting AppleMail preferences

AppleMail provides ways to customize some of its controls. For example, you can change the default font for your letters, or you can set the Mailer to be contracted when you create or open letters.

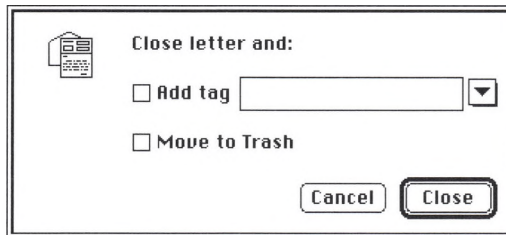
- 1 From within AppleMail, choose Preferences from the Edit menu.

The Preferences dialog box appears.

- 2 Review the options and make any changes necessary.



Clicking “Show options when closing a letter” in the Other section produces the following dialog box when you close a letter:



For information on tags, see “Using Tags to Filter Your Mail.”

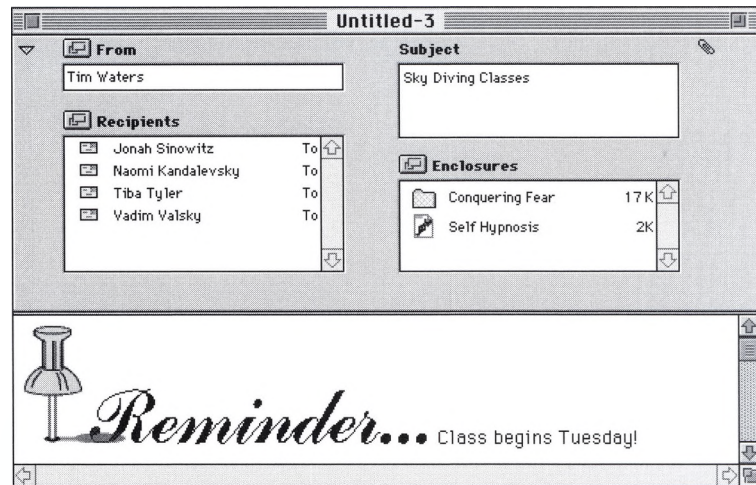
- 3 Click OK to confirm your option changes and close the dialog box.

Most options you have set take effect immediately; font preferences take effect with the next letter you create.

Keyboard shortcuts

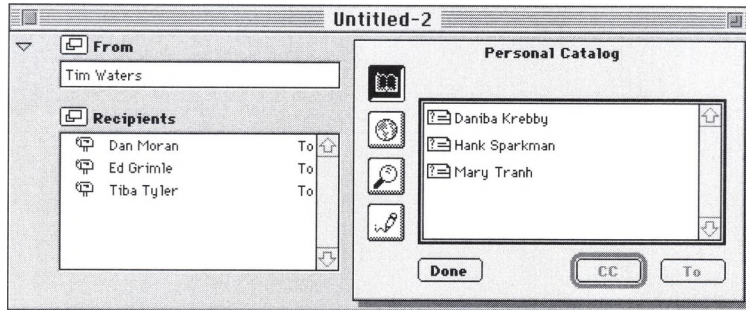
This section lists the many ways you can save time by using keyboard equivalents and other shortcuts in the Mailer and AppleMail.

Mailer shortcuts



To do this...	...use this shortcut
Contract/Expand Mailer	⌘-/
Switch areas in Mailer	Tab
Open catalog access panel	Select Recipients area and press Return or Enter
Switch between Mailer and AppleMail content area	Option-Tab

Catalog access panel shortcuts



To do this...

...use this shortcut

Move up and down a list

Type first letter or two of name
Up Arrow
Down Arrow

Add item as recipient

Double-click item
Click item and press Return

Add item as CC

Shift-Return
Shift-double-click item

Add item as BCC

Press Option; then click BCC
Shift and Option-double-click item
Shift-Option-Return

Add item to preferred
personal catalog

Option-click Save button
Option-double-click
Option-Return

Move to next/previous panel

Option-Up Arrow
Option-Down Arrow

Close catalog access panel

Escape key

AppleMail menu item shortcuts

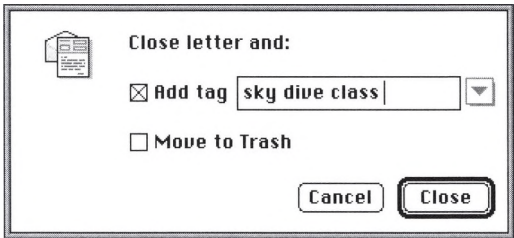


To do this...

...use this shortcut

Open default letterhead	⌘-N
Open a blank letterhead	Option-⌘-N
Close a letter with/without dialog box (toggle)	Option-⌘-W or Option-click close box

Close letter dialog box



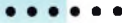
To do this...

...use this shortcut

Select /deselect tag Option	⌘-A
Select/deselect Move to Trash Option	⌘-M

8

Using Digital Signatures



You use a DigiSign Signer to approve, or “sign,” a document on your computer. Putting your digital signature on a document assures the integrity of the document. It marks the document in a way that any PowerTalk user—even those without Signers of their own and without access to PowerShare servers—can verify at any time.

This chapter tells how to create, use, and maintain digital signatures, as well as how to verify that a signature you see on an item is valid. You’ll learn how to

- create a Signer Approval Request
- create a valid Signer
- sign and verify letters, documents, and other files
- maintain your Signer

About digital signatures in PowerTalk

The Signer is a special kind of file you use to sign files digitally. You use the DigiSign Utility program to begin the process of getting a Signer. The DigiSign Utility program creates two files: a request form and an unapproved Signer. The request form contains information about who you are, and the unapproved Signer contains the encoded information that will become your approved Signer. You send the request form to the person or agency who has the authority to issue you an approval file.



Signer Request



unapproved Signer

After you receive your approval file, you use the DigiSign Utility program again to produce your approved Signer.



Approval

+



unapproved Signer

=



approved Signer

Once you have an approved Signer, you use it to sign files in the Finder, in AppleMail, and in other applications that work with PowerTalk.

Using a Signer is easy. For example, to sign a file in the Finder (a way to say that you approve of the document), just drag it to your Signer and then enter your DigiSign identification code. The identification code should be kept secret, known only to you; it prevents anyone else from using your personal Signer.



Annual Review



approved Signer

IMPORTANT Be sure to safeguard your Signer and identification code. Please note that the system cannot prevent intentional misuse (for example, someone presenting false identification when delivering a Signer request to the approval authority). Nor does it imply that the person signing the document has the actual authority to do so. You should exercise your own judgment about when to use the Signer and when you should accept documents that have been signed with a Signer.

A digital signature doesn't appear on a document in the same way a signature appears on a contract or at the bottom of a letter. Rather, it appears as a button that you press to verify the status of a digital signature.

In a document, the signature verification button usually appears to the right of the comments area in the document's Info box. (In some applications the verification button may appear elsewhere; check the application's user guide to be sure.)

Comments :



In a letter, the signature verification button with the name of the Signer next to it appears at the bottom of the mailer.



Mary Ann Hancock

Clicking the signature verification button displays a dialog box. The dialog box either shows who signed the item and confirms that the signature is verified, or states that the signature could not be verified.

On-screen help

If you need help when you are using the DigiSign Utility program, choose DigiSign Utility Help from the Help menu.

You can also use Balloon Help.

Creating a Signer Approval Request

If your company has been authorized to issue approval files for its employees, you will probably use a customized Signer request form. Your system administrator can answer questions about getting and using a Signer.

Otherwise, look for the insert that came with this package for instructions on using an outside approval authority to obtain an approval file.

Note: Your PowerTalk package includes a demonstration Signer so that you can see how your own Signer will operate. Use the demonstration Signer to practice the tasks described in “Signing and Verifying” later in this chapter or go through the tutorial called “Using a Signer” earlier in this manual.

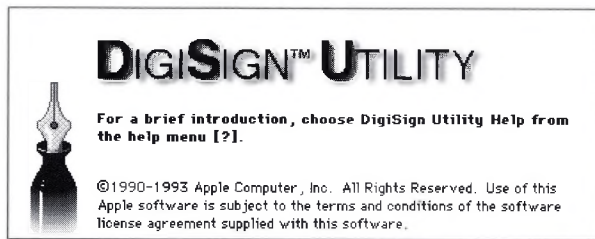
Follow these steps to create and submit your request:

- 1 **Open the DigiSign Utility program.**



DigiSign Utility

(The name of the application may be different if your company has a customized DigiSign Utility.) The program opens with a welcoming banner.

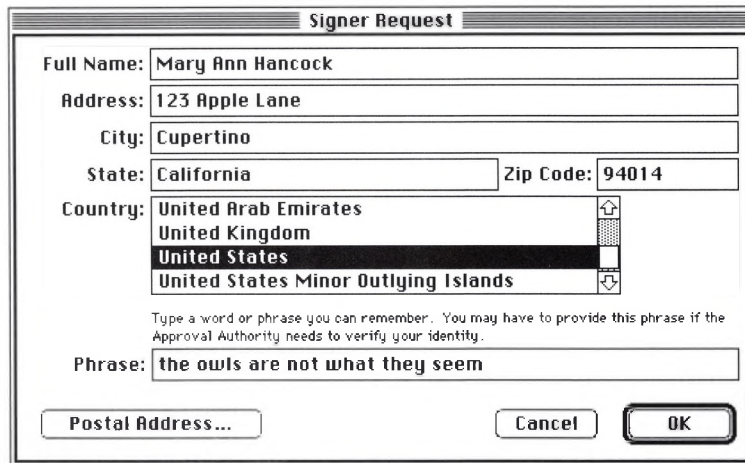


- 2 **Choose New Request from the File menu.**

A Signer request form appears on the screen.

- 3 **Type the appropriate information.**

Use the Tab key to move from item to item.



The "Signer Request" dialog box contains the following fields and controls:

- Full Name:** Mary Ann Hancock
- Address:** 123 Apple Lane
- City:** Cupertino
- State:** California
- Zip Code:** 94014
- Country:** A list box with four options: United Arab Emirates, United Kingdom, United States (highlighted), and United States Minor Outlying Islands.
- Phrase:** the owls are not what they seem
- Buttons:** "Postal Address...", "Cancel", and "OK".

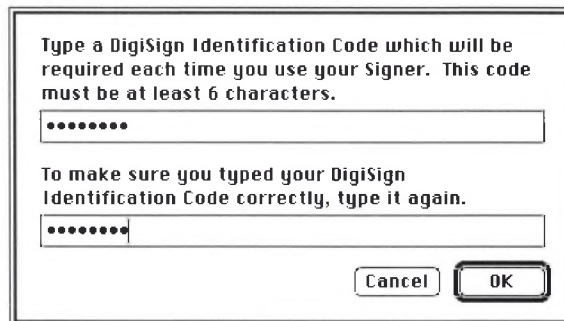
Below the Country list box, there is a small text instruction: "Type a word or phrase you can remember. You may have to provide this phrase if the Approval Authority needs to verify your identity."

Click the Postal Address button if your form has one and fill in the fields that appear.

IMPORTANT Memorize the phrase you type for your verification with the approval authority. Do not write it down. If you contact the approval authority with a problem, they will need to know this phrase before they can help you.

- 4 When you are satisfied that the information in the Signer Request is correct, click OK.

An identification code creation dialog box appears.



The "DigiSign Identification Code" dialog box contains the following elements:

- Text:** "Type a DigiSign Identification Code which will be required each time you use your Signer. This code must be at least 6 characters."
- Input Field:** A text box with six dots (••••••) indicating the code length.
- Text:** "To make sure you typed your DigiSign Identification Code correctly, type it again."
- Input Field:** A second text box with six dots (••••••) for re-entry.
- Buttons:** "Cancel" and "OK".

5 Type the identification code you'll use every time you use your Signer.

It must be at least six characters long.

Use the Tab key to move to the next box and retype the identification code for confirmation.

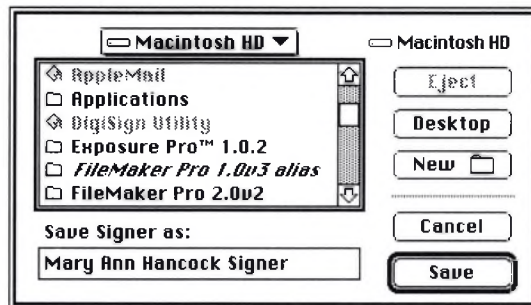
Here are some tips for choosing an identification code:

- It should not be your name.
- The longer it is, the harder it will be to guess.
- Mix upper- and lowercase letters, symbols, and numbers, as in “4Me!Only%”
- Make it easy to remember and don't write it down.
- Keep track of which letters are uppercase—the identification code is case-sensitive.

6 Click OK to close the identification code creation dialog box.

A navigation dialog box appears.

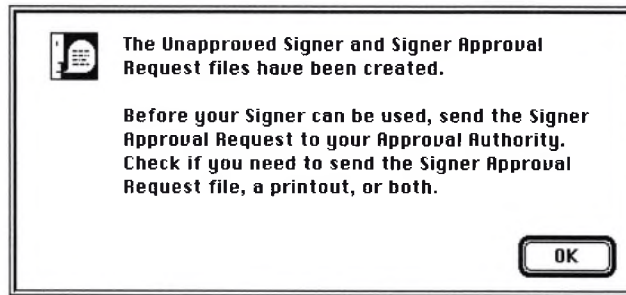
7 Choose a location for saving your unapproved Signer file and click Save.



Another dialog box appears, telling you that the program is creating files for you. (The process takes a few minutes.)



When the files have been created, you'll see this message:



8 Click OK.

Your newly generated request form appears with the encoded request information.



Some companies authorized to issue approval files to their employees may require that you sign a printed request form and have it notarized by a notary public. (To create a printed request form, choose Print from the File menu.)

Note: If you are going to use your Signer as an individual or in a small business, look for the insert that came with this package for instructions on using an outside approval authority.

9 Choose Save from the File menu to save your request form.

If you don't explicitly save your request form, a dialog box appears when you quit the program asking if you want to save it.

You have now created two files, a request and an unapproved Signer (which is not yet usable).



Mary Ann Hancock Request



Mary Ann Hancock Signer

- 10 **Print your request and send it, with a copy of the Request file on disk if necessary, to your approval authority.**

See the insert that came with your package for details.

Assuming that your request form has been completed properly, the approval authority will send back your Signer Approval file.

Approving your Signer

When you have received your Signer Approval file from the approval authority, follow these steps to approve your Signer file:

- 1 **Put a copy of your Signer Approval file on your startup disk.**

Keep the original in a secure place.



Mary Ann Hancock Request Approv

- 2 **Make a copy of your unapproved Signer file.**

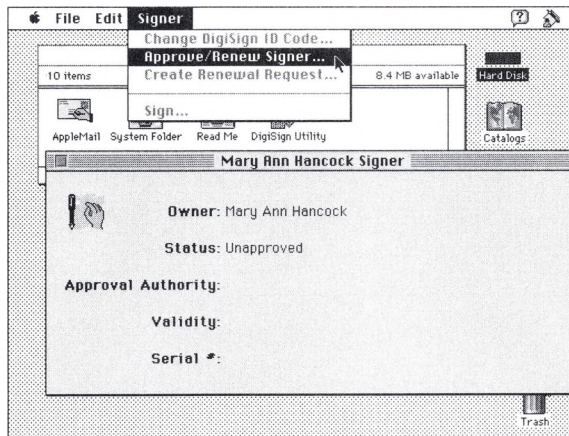
On rare occasions a problem may occur during the conversion from unapproved to approved Signer, and you may have to start over.

- 3 **Open the unapproved Signer file.**



Mary Ann Hancock Signer

- 4 Choose Approve/Renew Signer from the Signer menu.



A navigation dialog box appears.

- 5 Locate your approval file, and click Open.



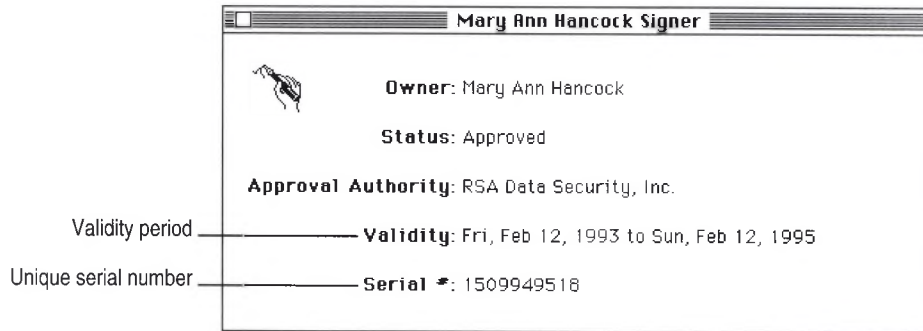
The process of creating your approved Signer takes a few moments. When it's finished, you'll see a confirmation dialog box.

6 Click OK.

The icon on your Signer changes.



You now have an approved Signer to use for signing documents.



IMPORTANT Treat your approved Signer file as you would an ATM card, keeping it in a secure place and limiting access to it. For example, you may want to keep your approved Signer file on a floppy disk that you carry with you. Know whom to contact if you ever need to revoke the Signer. If you learn that someone is trying to use your Signer, notify your approval authority immediately.

Signing and verifying

You can sign and verify files on the desktop or within application programs designed for PowerTalk.

Signing and verifying on the desktop

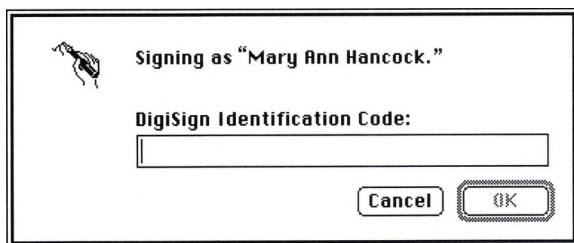
To sign a file on your hard disk, follow these steps:

- 1 Drag the file's icon to your Signer icon.



The Signer works on both locked and unlocked files.

- 2 Type your DigiSign Identification Code in the dialog box that appears, and click OK.



A progress indicator appears. When the process is complete, the document is signed—and locked to prevent inadvertent changes. Any PowerTalk user can verify your signature. Your verified signature means that you, and only you, digitally signed the document and no one has changed the document's content since you signed it.

IMPORTANT Signing a document also locks it. Don't unlock a document unless you have to. Changing a document invalidates its signature, and sometimes an application changes documents in ways that might be invisible. For example, some applications save window positions; opening and closing a signed document in such a case might invalidate the signature, even though you have made no content changes.

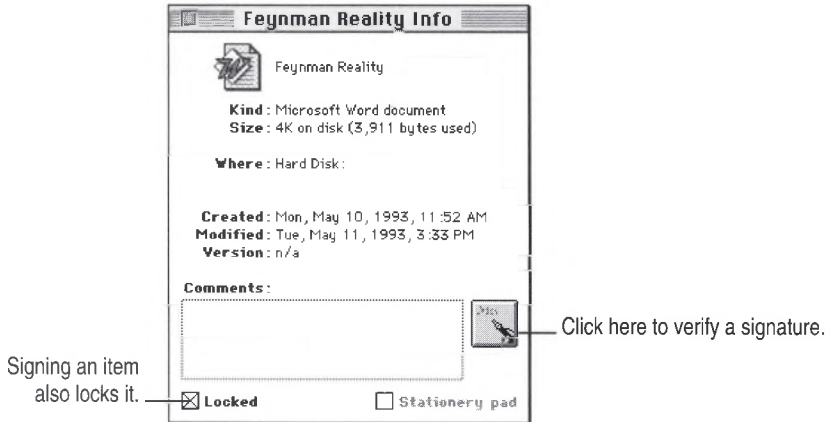
To verify a digital signature, follow these steps:

- 1 **Select the item that you want to verify.**
- 2 **Choose Get Info from the File menu.**

The Info window for that item appears.

- 3 **Click the verification button to the right of the Comments area.**

If there's no verification button, the item may not be signed.

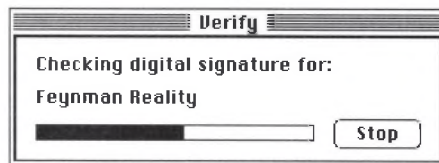


A dialog box appears, asking if you want to verify or remove the signature.

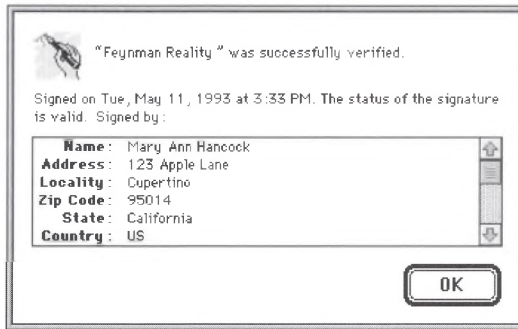
To have the signature verified without this dialog appearing, option-click the verification button.

- 4 **Click Verify.**

A progress indicator tells you that the signature is being checked.



If the signature is verified, a dialog box with signature information appears. (You may have to scroll to see all the information.) When you're finished reading the information, click OK to put the box away.



IMPORTANT If the signature isn't verified, contact the person who sent the document. If that person isn't available, contact your approval authority.

Any PowerTalk user—even one without a Signer—can verify a signed document, and check on the document's source and content integrity.

Signing and verifying within applications

You can sign a document in an application that works with digital signatures. For instance, when you choose Send from the Mail menu in AppleMail, you see a dialog box offering an option to sign the letter before you send it.



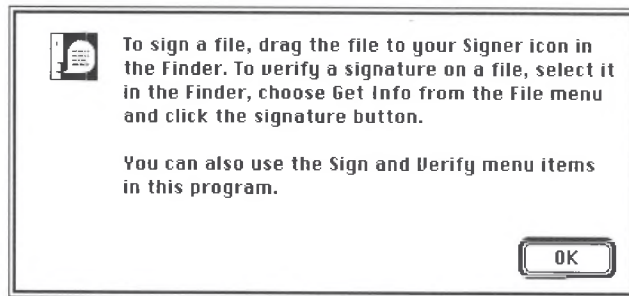
Some application programs offer the option to sign separate parts of a document, such as certain sections of a form that require approval signatures. These programs also offer ways to verify different parts of a signed document. See the documentation that came with the program for more details on signing and verifying.

Note: When only part of a document is signed, the verification button doesn't show in the document's Info box.

You can also use the DigiSign Utility program to sign and verify files, although this method might not be as convenient as working in the Finder: After you choose Sign in the Signer menu or Verify in the File menu, you'll be asked to locate the needed file.

Removing the DigiSign Utility Help dialog box

When you open your Signer, the DigiSign Utility program shows a dialog box with suggestions for what you might want to do.

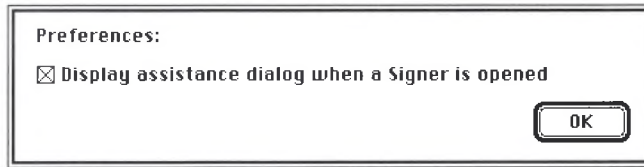


To prevent this dialog box from appearing, follow these steps:

- 1 Choose Preferences from the File menu.

The Preferences dialog box appears.

- 2 Click to remove the X from the Preferences box.



- 3 Click OK to close the dialog box.

You can turn this option back on anytime you wish.

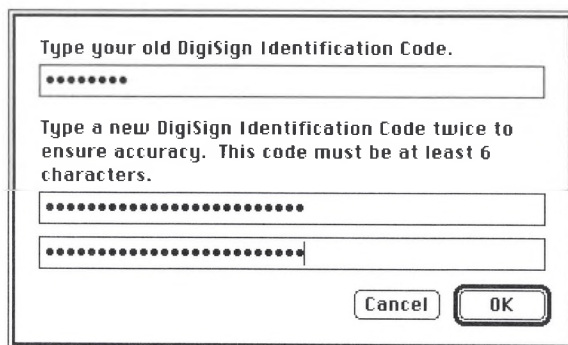
Maintaining your Signer

After you have an approved Signer, be sure to keep a copy of the DigiSign Utility program in a secure place. You'll need it to change your DigiSign Identification Code and to renew your Signer.

Changing your DigiSign Identification Code

To change your DigiSign Identification Code, follow these steps:

- 1 Open your Signer file.
The DigiSign Utility program opens.
- 2 Choose Change DigiSign ID Code from the Signer menu.
A dialog box appears.
- 3 Follow the instructions in the dialog box and click OK.



Type your old DigiSign Identification Code.

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Type a new DigiSign Identification Code twice to ensure accuracy. This code must be at least 6 characters.

.....

.....

Cancel OK

From now on, use your new identification code when you use your Signer.

If you have more than one copy of your Signer, be sure to change the identification code in each copy.

Renewing your Signer

The typical length of a Signer's validity is two years, depending on your company policy or the policy of your approval authority. To check your Signer's validity dates, open the Signer file; the dates are in the dialog box that appears.



Mary Ann Hancock Signer

 **Owner:** Mary Ann Hancock

Status: Approved

Approval Authority: RSA Data Security, Inc.

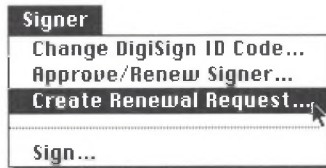
Validity: Fri, Feb 12, 1993 to Sun, Feb 12, 1995

Serial #: 1509949518

Contact your approval authority and find out what you need to send to renew your Signer (file, printout, or both) and how long it will take to process your renewal request. Be sure to begin that process well before your Signer is set to expire.

To prepare a Signer Renewal Request follow these steps:

- 1 Open your Signer.
- 2 Choose Create Renewal Request from the Signer menu.



- 3 Type the address where you want your renewal file sent if your address has changed since your last request.
- 4 Send the form to your approval authority.

Check with your approval authority for more information.

Revoking your Signer

Ordinarily the only way that other users can find out that your Signer has been revoked is to call your approval authority. When you revoke your Signer, alert people with whom you collaborate. Give them the serial number of your old Signer so that they can disregard current items showing that number in the verification window. (They may have to scroll the window to see it.)

IMPORTANT If you suspect that someone has obtained your approved Signer and your identification code, call your approval authority immediately to revoke your Signer. Then submit a new Signer request.



Appendix A Troubleshooting

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This appendix lists some common problems you might encounter when you use PowerTalk, plus solutions to those problems. Topics covered include

- registration problems
- access to catalogs and services
- mail problems
- digital signatures

Try these solutions first. If they don't solve the problem, notify your system administrator.

Registration problems

You get a dialog box reporting that there is someone else with your name in the same catalog. The two names are differentiated by a creation ID.

Check with your administrator to be sure which creation ID is yours.

Access to catalogs and services

You can't find the Key Chain icon or you've thrown it away.

To create a new Key Chain, go to the PowerTalk Setup control panel and click the Key Chain button.

You can't find the Mailbox or the Catalogs icon.

PowerTalk is probably turned off. Go to the PowerTalk Setup control panel and activate PowerTalk.

AppleTalk or PowerShare catalogs are dimmed in the Catalogs window.

Go to the Chooser and activate AppleTalk.

You get a message that the system can no longer access a server on your network.

In some cases a Resolve button appears in the notification dialog box. Click the button to reconnect.

Check the cable connection on the back of your computer.

Mail problems

You're not receiving mail or you can't find your own Direct AppleTalk mail address.

The machine name may be missing. Go to the Sharing Setup control panel and check the Machine Name field.

You get a Disk Full message when you try to send a letter.

You must have at least 1.5 MB free on your disk to send or receive mail. Remove as many files as necessary to provide the needed space. One good way to create disk space is to go to the Out Tray and throw away items that have already been sent.

You get a problem report in your In Tray that someone did not receive mail.

You'll see a nondelivery icon.

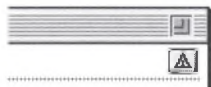


Check the address of the nonrecipient:

- Review the spelling of any typed address.
- The intended recipient on an AppleTalk network might have changed the name or zone of his or her machine.
- The intended recipient with a PowerShare address has had his or her information card moved from one catalog folder to another.
- If an address is an alias, be sure that it points to the correct original (or make a new alias).
- If an address is a copy, check that the copied information is current.
- Check for any problem reports in the In Tray.
- There may be trouble with your setup (PowerTalk Setup control panel) or with access software you installed for a particular address.

A triangle icon appears on the right side of your Out Tray.

The icon looks like this:



A server may be down or you've temporarily lost connection. Click the icon to get a problem report with one or more entries. Double-click any report to bring up more information; you may be able to reconnect immediately by clicking the Resolve button at the lower-right corner of the dialog box.

The system can no longer deliver mail to an address that was previously correct.

Check the kind of address you're using. If it is a copy or alias to a catalog address, the original address may have changed. Find the original and make another copy or alias.

You're on someone else's machine checking your PowerShare mail through a Visitor's Mailbox, and all you see is mail marked "remote" in the Location column.

This is normal. PowerShare mail is stored on a server, while other forms of mail are sent directly to your hard disk. When you use PowerShare mail, you are looking at your mail stored on a server.

Digital signatures

It takes a long time to create your unapproved Signer and request files.

Please be patient, especially if you are using a Macintosh computer model with a slower processing speed.

You type fewer than 64 characters for a name or address in the Approval Request form, but you still get an alert saying that what you typed exceeds the limit.

The form has different length limitations for different fields. A character with an accent or one from a non-English alphabet (such as Japanese Kanji) takes up more than 1 byte of storage. Try to reduce what you type to the minimum necessary.

You see a message such as “File required to process this request” during the process of creating your unapproved Signer and request files.

Your request information fills more than one printed page. In such a case you must send your request file, along with your printed, signed, and notarized request form, to your approval agency.

You forget your Signer identification code.

You must get a new Signer. Call your approval authority immediately to revoke your Signer. Then submit a new request form.

You lose your unapproved Signer file after you send your request.

You must get a new Signer. Call your approval authority immediately and revoke your Signer request. Then submit a new request form.

Your Signer has been stolen.

Don't panic. The thief still needs your identification code to use the Signer. Call your approval authority immediately, revoke your Signer, and submit a request for a new one.

Your Signer doesn't work anymore.

Here are some things to check:

- Check whether your Signer has expired. Open the Signer file and check the validation information. Apply for a renewal if your Signer has expired.
- Be sure that the system date is correct on your computer. Check the Date & Time control panel and change the time if necessary. Also check that you have set your system clock correctly.
- Your Signer file may be damaged. Make a copy using the backup you created when you first received your Signer Approval file.



Appendix B

Using Direct Dialup Mail



You use the Direct Dialup Mail Accessory Kit for sending and receiving mail over a modem to another computer. This appendix covers

- setting up the software
- adding dialup addresses
- using dialup addresses in the Mailer
- troubleshooting

Setting up the software

After you have installed Direct Dialup mail, you are ready to set it up. Follow these steps:

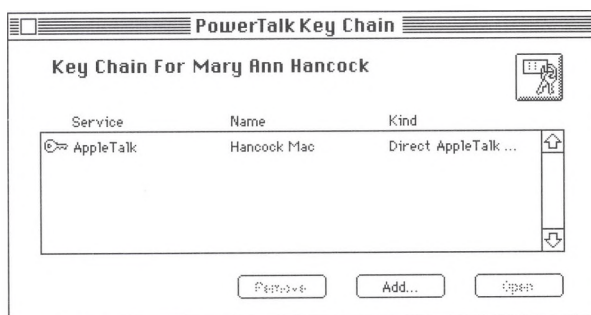
- 1 Open your PowerTalk Key Chain.



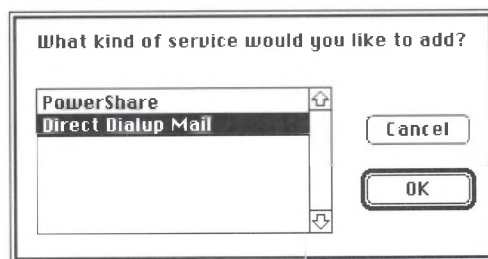
PowerTalk Key Chain

If you haven't already given your Key Chain Access Code, you'll be asked to enter it.

The Key Chain dialog box appears, listing your current services.

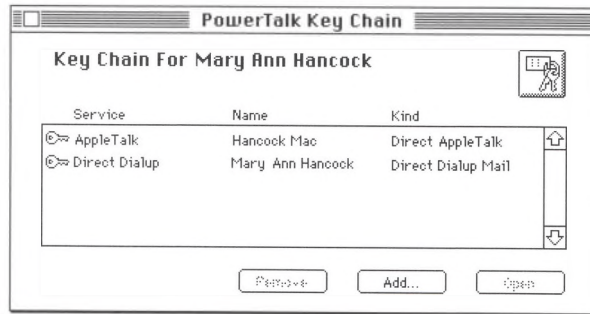


- 2 Click the Add button to bring up a list of available services.



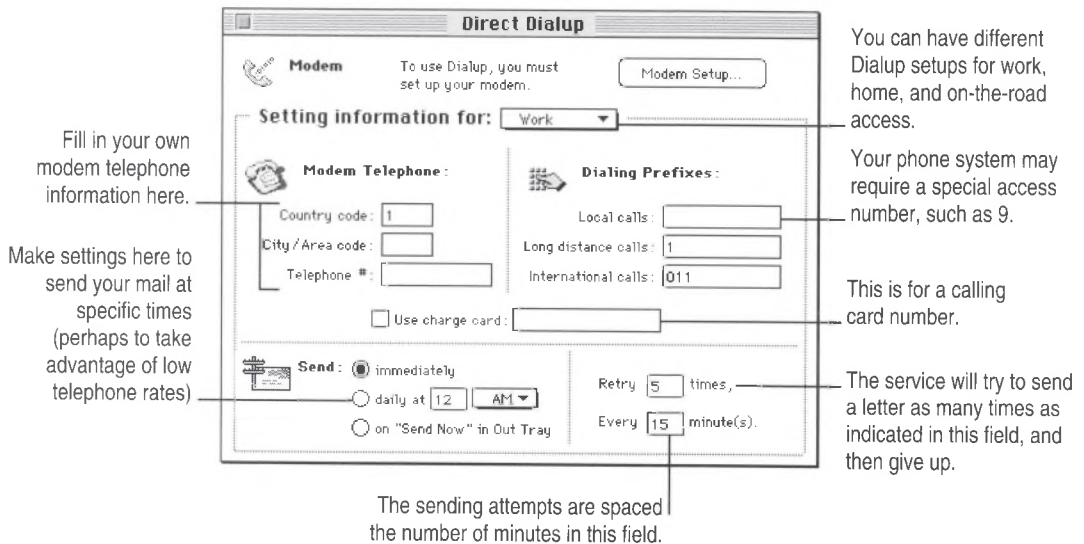
3 Select Direct Dialup Mail and click OK.

The dialog box closes and Direct Dialup is added to your list of available services.



4 Double-click Direct Dialup.

The Direct Dialup dialog box appears.



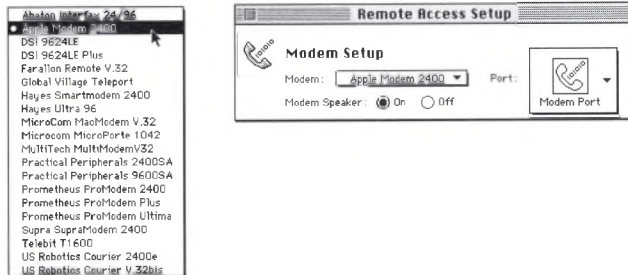
5 Fill in or change information as appropriate.

- 6 To set the software to control your modem, click Modem Setup.



- 7 In the dialog box that appears, use the pop-up menus to choose the kind of modem you have and make sure the port setting is correct.

Click the appropriate radio button to turn the modem speaker on or off.



IMPORTANT If the pop-up menu doesn't list your modem, try the Hayes setting with the same speed as yours. If that doesn't work, contact the manufacturer to get the necessary software.

- 8 Close the Remote Access Setup, Direct Dialup, and PowerTalk Key Chain windows.

Your software is now installed and ready to run.

Adding dialup addresses

You can add a dialup telephone address to an information card for easy access.

Follow these steps to add a Direct Dialup mail address:

- 1 Find the information card to which you want to add a Direct Dialup mail address.

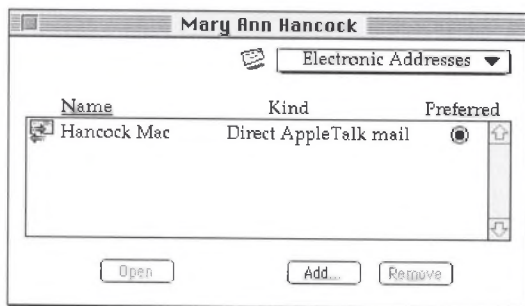


Mary Ann Hancock

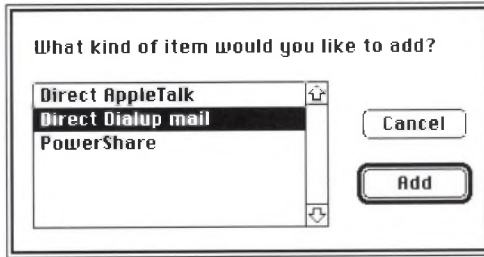
- 2 Open the card and use the pop-up menu to move to the Electronic Addresses page.



- 3 When the Electronic Addresses page appears, click Add at the bottom of the card.



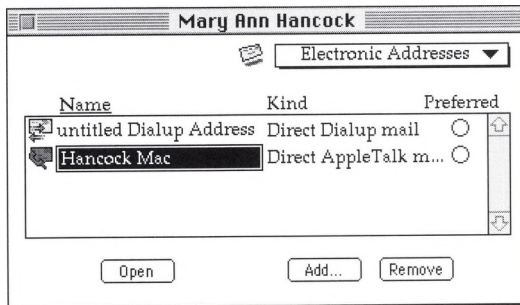
A dialog box appears, asking for the kind of address to add.



- 4 Select "Direct Dialup mail" and click Add.

An untitled Dialup Address line appears on the card, ready for you to fill out.

Note: Make this address the preferred one by highlighting its radio button. The Mailer uses the preferred address when it sends documents.



- 5 Type a descriptive name for this address.

Something like "Mary's Home Modem" is a good choice because it describes both the owner and the modem's location.

- 6** Double-click the icon to the left of the address line to add the necessary dialup information.

Mary's Home Modem

☒ Use Key Chain Dialup info to form the number to dial.

Country code:

City/Area code:

Telephone #:

☐ Just dial the following number:

System will dial:

1-408-555-1111

Select the top radio button to have the system use the information you supplied in the Direct Dialup dialog box (described earlier in this appendix) to form this person's telephone number. Then enter the required numbers in each of the three fields.

(For example, if your area code and the area code you enter on this person's card are the same, the system won't use the area code when it dials.)

Note that the "Country code" field can hold the standard 1 prefix used before North American area codes.

Select the bottom radio button to have the system use the number you type into the lowest field without regard for the information you supplied in the Direct Dialup dialog box.

You can change any of these settings at any time.

- 7** Click the **Close** box when you are finished to confirm your settings and put the dialog box away.
- 8** Click the information card's close box.

Once the dialup address information is complete, you can send mail to that address just as you can to any other address in PowerTalk.

Using dialup addresses in the Mailer

To add a dialup address from your personal catalog, follow these steps:

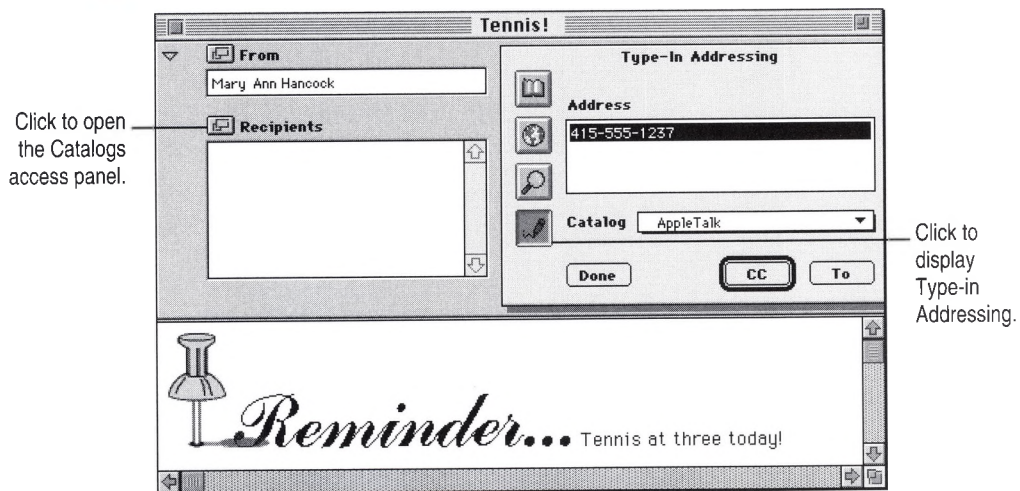
- 1 Click the top button in the Catalogs access panel.
- 2 Locate and select the information card containing the dialup address.

Note: To use an information card as the source of a dialup address, a Direct Dialup number must be selected as the preferred address on the Electronic Addresses section of the information card.

- 3 Click the To button.

To type a dialup address for a letter's recipient, follow these steps:

- 1 Open the Mailer's Catalogs access panel and click the bottom button.



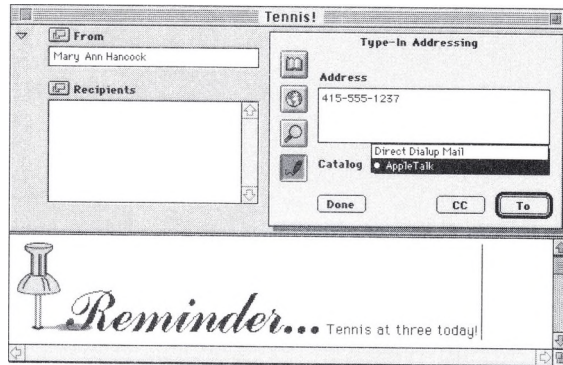
- 2 Type the exact phone number for the dialup recipient's modem.

You can use a hyphen to separate the parts of the number if you want.

You can also use the form `<name>@<number>`.

- 3 Choose Dialup from the catalog pop-up menu.

- 4 Click To (or press the Return or Enter keys) to address the letter.



To put a copy of this dialup address in your preferred personal catalog, press the Option key and click the Save button.

- 5 Provide any other necessary information in the Mailer and send the document.

Troubleshooting

You may experience an occasional problem using the dialup service. Here are a few common problems and some suggested solutions.

When you type a phone number in an address window, the system adds a message at the bottom stating that your dialup service has not been set up.

Open the PowerTalk Setup control panel and check that the dialup service information is complete and that you have entered your local phone number.

You've set up your dialup service, but it doesn't seem to work. For instance, the modem won't dial an address.

Check the following:

- Be sure that the modem is turned on and that your phone line is connected.
- Verify that you've selected your model of modem in the Remote Access Setup control panel. If your modem's auto-answer light is on, your setup is probably OK.

You reply to a letter that originally had multiple recipients, at least one of which had a dialup address. But your reply to that dialup address doesn't get through.

Check the area code of the dialup address. If the original sender of the letter and the dialup recipient were in the same area code (for example, 408), but you are in a different area code (for example, 212), the dialup recipient's address would not have any area code listed. (There would have been no need for the original sender to include an area code.)

Unless you change the dialup address, the system would dial without an area code—and try to send your reply to your area code (212) instead of the proper one (408).



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